

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) Goldgar, A. Benjamin	2. Court or Organization Bankruptcy Court, N.D. Ill.	3. Date of Report 5/31/2013
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) United States Bankruptcy Judge	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 Suite 638 219 South Dearborn Street Chicago, IL 60604		
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. Insert signature on last page.		

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 No. 1 (see note)
2.	Trustee	Trust No. 2 (see note)
3.		
4.		
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.		
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.)*DATESOURCE AND TYPEINCOME
(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.)*DATESOURCE AND TYPE

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.)*SOURCEDATESLOCATIONPURPOSEITEMS PAID OR PROVIDED

1.	American Bankruptcy Institute	6/7/12-6/10/12	Traverse City, MI	Central States Bankruptcy Workshop	Transportation (mileage), food, lodging
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2.	National Conference of Bankruptcy Judges	10/23/12-10/26/12	San Diego, CA	Annual Meeting	Lodging (partial)
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3.					
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4.					
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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. Fidelity Cash Reserves Money Market Fund	A	Dividend	K	T					
2. Traditional IRA-Fidelity (4)	D	Dividend	N	T					
3. - Strategic Advisors Small-Mid Cap Fund									
4. - Fidelity Capital and Income					Sold	11/15/12	J	B	
5. - Fidelity Short-Term Bond					Sold (part)	01/27/12	J	A	
6. - Fidelity Total Bond									
7. - Pimco Total Return Administrative Shares									
8. - Pimco Short Term Administrative Shares									
9. - Pimco Commodity Real Return Strat Admin CL					Sold (part)	01/11/12	J	A	
10.					Sold	01/13/12	J	A	
11. - T Rowe Price High Yield Advisor CL					Sold	03/22/12	J	B	
12. - Fidelity Strategic Advisors Value Fund									
13. - Strategic Advisors International Fund					Sold (part)	01/27/12	J	A	
14.					Sold (part)	03/22/12	J	A	
15.					Buy (add'l)	05/25/12	J		
16.					Sold (part)	08/03/12	J	A	
17.					Sold (part)	09/06/12	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 H = \$1,000,001 - \$5,000,000	D = \$5,001 - \$15,000 I = 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 = \$250,001 - \$500,000,000	K = \$15,001 - \$50,000 O = \$500,001 - \$1,000,000	P1 = \$1,000,001 - \$5,000,000 P4 = More than \$5,000,000,000	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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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.					Sold (part)	11/15/12	J	A	
19. - Strategic Advisors Core Income Fund					Buy (add'l)	01/11/12	J		
20.					Buy (add'l)	01/27/12	J		
21.					Buy (add'l)	03/22/12	J		
22.					Buy (add'l)	09/06/12	J		
23. - Franklin Gold and Precious Metals CL A									
24. - Templeton Global Bond CL A									
25. - Strategic Advisors U.S. Opportunity Fund									
26. - Strategic Advisors Core Fund									
27. - Strategic Advisors Growth Fund					Sold (part)	03/22/12	J	A	
28.					Sold (part)	11/30/12	J	A	
29. - Strategic Advisors Emerging Markets									
30. - Strategic Advisors Income Opportunity Fund					Buy (add'l)	03/22/12	J		
31.					Buy (add'l)	11/15/12	J		
32. - FIMM Money Market Port Inst CL					Buy (add'l)	01/11/12	J		
33.					Buy (add'l)	01/13/12	J		
34.					Sold (part)	01/27/12	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	

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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)
35.					Buy (add'l)	03/22/12	J		
36.					Buy (add'l)	03/23/12	J		
37.					Buy (add'l)	05/25/12	J		
38.					Buy (add'l)	11/15/12	J		
39. - Strategic Advisors Short Duration Fund					Buy	01/27/12	J		
40.					Buy (add'l)	03/22/12	J		
41.					Buy (add'l)	08/03/12	J		
42.					Buy (add'l)	09/06/12	J		
43.					Buy (add'l)	11/16/12	J		
44. - Arden Alternative Strategies Class 1					Buy	11/30/12	J		
45. Traditional IRA-Fidelity (3)	C	Dividend	M	T					
46. - Strategic Advisors Small-Mid Cap Fund									
47. - Fidelity Capital and Income (Y)					Sold	03/15/12	J	A	
48. - Fidelity Total Bond									
49. - Pimco Total Return Administrative Shares									
50. - Pimco Short Term Administrative Shares									
51. - T Rowe Price High Yield Advisor CL					Sold	03/15/12	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
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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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)
52. - Strategic Advisors International Fund									
53. - Strategic Advisors U.S. Opp Fund									
54. - Fidelity Select Gold									
55. - Credit Suisse Commd Return Strategy Com Shr					Sold	01/13/12	J	A	
56. - Fidelity High Income					Sold	03/15/12	J	A	
57. - Metropolitan West Low Duration M									
58. - Templeton Global Bond CL A									
59. - Strategic Advisors Value Fund									
60. - Strategic Advisors Core Fund									
61. - Strategic Advisors Growth Fund									
62. - Strategic Advisors Emerging Markets									
63. - Strategic Advisors Core Income Fund					Buy (add'l)	11/30/12	J		
64. - Strategic Advisors Income Opportunity Fund									
65. - FIMM Money Market Port Inst CL					Buy (add'l)	01/13/12	J		
66.					Sold (part)	01/25/12	J		
67.					Buy (add'l)	03/15/12	J		
68.					Buy (add'l)	05/25/12	J		

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69. - Merger Fund									
70. - Strategic Advisors Short Duration Fund					Buy	01/25/12	J		
71.					Buy (add'l)	03/15/12	J		
72. - Arden Alternative Strategies Class 1 (Y)					Buy	11/30/12	J		
73. Rollover IRA-Fidelity (3)	E	Dividend	O	T					
74. - Strategic Advisors Small-Mid Cap Fund					Sold (part)	03/15/12	J	B	
75. - Fidelity Capital and Income					Sold	03/15/12	J	C	
76. - Fidelity Total Bond					Sold (part)	05/25/12	J	B	
77. - Pimco Total Return Administrative Shares					Sold (part)	05/25/12	J	B	
78.					Sold (part)	09/06/12	J	A	
79.					Sold (part)	11/15/12	J	A	
80. - Pimco Short Term Administrative Shares					Sold (part)	01/25/12	J	A	
81.					Sold (part)	05/25/12	J	A	
82.					Sold (part)	09/06/12	J	A	
83. - T Rowe Price High Yield Advisor CL					Sold	03/15/12	J	C	
84. - Strategic Advisors International Fund					Sold (part)	01/25/12	J	A	
85.					Sold (part)	03/15/12	J	B	

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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86.					Buy (add'l)	05/25/12	J		
87.					Sold (part)	08/03/12	J	A	
88.					Sold (part)	09/06/12	J	A	
89.					Sold (part)	11/15/12	J	A	
90.					Sold (part)	11/30/12	J	A	
91. - Strategic Advisors US Opportunity Fund					Sold (part)	03/15/12	J	A	
92.					Buy (add'l)	05/25/12	J		
93.					Buy (add'l)	11/15/12	J		
94. - Fidelity Select Gold					Buy (add'l)	01/13/12	J		
95. - Credit Suisse Commnd Return Strategy Com Shr					Sold	01/13/12	J	B	
96. - Fidelity High Income					Sold	03/15/12	J	C	
97. - Metropolitan West Low Duration M					Sold (part)	01/25/12	J	A	
98.					Sold (part)	05/25/12	J	A	
99.					Sold (part)	08/03/12	J	A	
100.					Sold (part)	11/15/12	J	A	
101. - Templeton Global Bond Class A					Sold (part)	03/15/12	J	A	
102. - Fidelity Money Market									

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103. - Strategic Advisors Value Fund					Sold (part)	01/13/12	J	A	
104.					Sold (part)	03/15/12	J	A	
105.					Buy (add'l)	05/25/12	J		
106.					Sold (part)	09/06/12	J	A	
107. - Strategic Advisors Core Fund					Sold (part)	01/13/12	J	A	
108.					Sold (part)	03/15/12	J	A	
109. - Strategic Advisors Growth Fund					Sold (part)	01/13/12	J	A	
110.					Sold (part)	03/15/12	J	A	
111.					Sold (part)	11/13/12	J	B	
112. - Strategic Advisors Emerging Markets					Sold (part)	03/15/12	J		
113.					Buy (add'l)	05/25/12	J		
114. - Strategic Advisors Income Opportunity Fund					Buy (add'l)	03/15/12	J		
115.					Buy (add'l)	03/16/12	J		
116.					Sold (part)	05/25/12	J	A	
117.					Sold (part)	11/15/12	J	A	
118. - Strategic Advisors Core Income Fund					Buy (add'l)	01/13/12	J		
119.					Buy (add'l)	01/25/12	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	
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120.					Buy (add'l)	03/15/12	J		
121.					Sold (part)	05/25/12	J	A	
122.					Buy (add'l)	09/06/12	J		
123.					Buy (add'l)	11/15/12	J		
124.					Buy (add'l)	11/30/12	J		
125. - FIMM Money Market Port Inst CL					Buy (add'l)	01/13/12	J		
126.					Buy (add'l)	01/17/12	J		
127.					Sold (part)	01/25/12	J		
128.					Buy (add'l)	03/15/12	J		
129.					Buy (add'l)	05/25/12	J		
130.					Buy (add'l)	09/06/12	J		
131.					Buy (add'l)	11/15/12	J		
132. - Merger Fund					Sold (part)	11/30/12	J		
133. - Strategic Advisors Short Duration Fund					Buy	01/25/12	J		
134.					Buy (add'l)	03/5/12	J		
135.					Buy (add'l)	08/03/12	J		
136.					Buy (add'l)	09/06/12	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	

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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)
137.					Buy (add'l)	11/15/12	J		
138.					Buy (add'l)	11/30/12	J		
139. - Arden Alternative Strategies Class 1					Buy	11/30/12	J		
140. State of Illinois Deferred Compensation Plan -- 401(k)	A	Dividend	K	T					
141. - Vanguard Institutional Index Fund Plus									
142. Fidelity Investment Grade Bond Fund (1)	A	Dividend	K	T					
143. Fidelity Short Term Bond (1)	A	Dividend	K	T					
144. Fidelity Core Account - Cash (1)	A	Interest	J	T	Buy	03/23/12	L		
145.					Sold (part)	07/13/12	K		
146.					Sold (part)	11/28/12	K		
147. Fidelity 529 College Investment Plan (1)									
148. - NH Cash Reserves					Sold	07/13/12	J		
149. Fidelity Investment Grade Bond Fund (2)	A	Dividend	K	T					
150. Fidelity 529 College Investment Plan (2)									
151. - NH Cash Reserves					Sold	07/10/12	K		
152. Fidelity Short Term Bond (2)	A	Dividend	K	T	Sold (part)	07/11/12	J	A	
153. Adirondack Trust Co. stock	D	Dividend	M	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	

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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)
154. Bank of America Growth Money Market Savings	A	Interest	L	T					
155. Fidelity Deferred Annuity									
156. - Fidelity VIP Investment Grade Bond Fund		None	N	T					
157. - Fidelity VIP Strategic Income Fund		None	L	T					
158. Vanguard IRA (4)	E	Dividend	P1	T					
159. - Vanguard Total Bond Market Index Fund					Sold (part)	05/15/12	K		
160. - Vanguard Total International Stock Index Fund					Buy (add'l)	05/15/12	K		
161. - Vanguard Stock Market Index Fund									
162. Fidelity Cash Reserves (1)	A	Dividend	K	T					
163. Fidelity Cash Reserves (2)		None			Sold	07/10/12	J		
164. Strategic Advisors International Fund (1)		None			Sold	03/22/12	J	A	
165. Strategic Advisors Value Fund (1)		None			Sold	03/22/12	J	A	
166. Strategic Advisors Small-Mid Cap Fund (1) (Y)		None			Sold	03/22/12	J	A	
167. Strategic Advisors U.S. Opportunity Fund (1) (Y)		None			Sold	03/22/12	J	A	
168. Strategic Advisors Core Fund (1)		None			Sold	03/22/12	J	A	
169. Strategic Advisors Growth Fund (1)		None			Sold	03/22/12	J	A	
170. Strategic Advisors Emerging Markets (1) (Y)		None			Sold	03/22/12	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	

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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)
171. FIMM Money Market Port Inst CL (1)	A	Dividend			Sold (part)	01/13/12	J		
172.					Sold	03/22/12	J		
173. Fidelity Real Estate Income (1) (Y)	A	Dividend			Sold	03/22/12	J	A	
174. AQR Diversified Arbitrage Class I (1)		None			Sold	03/22/12	J		
175. Fidelity GNMA Fund (1)	A	Dividend			Sold	03/22/12	J		
176. Fidelity Total Bond Fund (1)	A	Dividend			Sold	03/22/12	J		
177. Strategic Advisors Income Opportunities (1)	A	Dividend			Sold	03/22/12	J	A	
178. Strategic Advisors Core Income Fund (1)	A	Dividend			Sold	03/22/12	J	A	
179. Metropolitan West Low Duration (1)	A	Dividend			Sold	03/22/12	J	A	
180. Pimco Total Return Administrative Shares (1)	A	Dividend			Sold	03/22/12	J	A	
181. Pimco Short Term Administrative Shares (1)	A	Dividend			Sold	03/22/12	J		
182. T. Rowe Price Short Term BD FD ADV (1)	A	Dividend			Sold	03/22/12	J		
183. Templeton Global Bond Class A (1)	A	Dividend			Sold	03/22/12	J		
184. Fidelity Select Gold (1) (X)		None			Sold	03/22/12	J		
185. Credit Suisse Commnd Return Strategy Inst Sh (1) (X)		None			Sold	01/13/12	J		
186. Strategic Advisors Short Duration Fund (1)	A	Dividend			Buy	01/13/12	J		
187.					Buy (add'l)	03/08/12	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 \$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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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)
188.					Sold	03/22/12	J	A	
189. Strategic Advisors International Fund (2)	A	Dividend	J	T	Sold (part)	03/23/12	J	A	
190. Strategic Advisors Value Fund (2)	A	Dividend	J	T	Sold (part)	03/23/12	J	A	
191. Strategic Advisors Small-Mid Cap Fund (2) (Y)	A	Dividend	J	T	Sold (part)	03/23/12	J	A	
192. Strategic Advisors U.S. Opportunity Fund (2) (Y)	A	Dividend	J	T	Sold (part)	03/23/12	J	A	
193. Strategic Advisors Core Fund (2)	A	Dividend	J	T	Sold (part)	03/23/12	J	A	
194. Strategic Advisors Growth Fund (2)	A	Dividend	J	T	Sold (part)	03/23/12	J	A	
195. Strategic Advisors Emerging Markets (2) (Y)									
196. Fidelity Capital & Income (2) (Y)	A	Dividend			Sold	03/15/12	J	A	
197. Fidelity High Income (2) (Y)	A	Dividend			Sold	03/15/12	J	A	
198. Fidelity Total Bond (2)	A	Dividend	J	T					
199. Strategic Advisors Income Opportunities (2)	A	Dividend	J	T	Buy (add'l)	03/15/12	J		
200. Strategic Advisors Core Income Fund (2)	A	Dividend	K	T	Buy (add'l)	03/23/12	J		
201. Metropolitan West Low Duration (2) (Y)									
202. Pimco Total Return Administrative Shares (2)	A	Dividend	J	T	Buy (add'l)	03/23/12	J		
203. Pimco Short Term Administrative Shares (2)	A	Dividend	J	T	Buy (add'l)	03/23/12	J		
204. T. Rowe Price High Yield Advisor CL (2) (Y)	A	Dividend			Sold	03/14/12	J	A	

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.)

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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)
205. Templeton Global Bond Class A (2) (Y)									
206. T. Rowe Price Short Term Bd Fd Adv CL (2)	A	Dividend			Buy	03/23/12	J		
207.					Sold	11/15/12	J	A	
208. Credit Suisse Commd Return Strategy Inst Sh (2) (X)		None			Sold	01/13/12	J		
209. Merger Fund (2) (X)		None			Sold	03/23/12	J		
210. Fidelity Real Estate Income (2)	A	Dividend	J	T	Buy	03/23/12	J		
211. AQR Diversified Arbitrage Class 1 (2)	A	Dividend	J	T	Buy	03/23/12	J		
212. FIMM Mmkt Port Inst CL (2) (X)	A	Dividend	J	T					
213. Arden Alternative Strategies Class 1 (2) (Y)		None	J	T	Buy	11/28/12	J		
214. Fidelity GNMA Fund (2)	A	Dividend	J	T	Buy	03/28/12	J		
215. Strategic Advisors Short Duration Fund (2)	A	Dividend	J	T	Buy	01/25/12	J		
216.					Buy (add'l)	03/15/12	J		
217.					Buy (add'l)	03/23/12	J		
218.					Buy (add'l)	08/03/12	J		
219.					Buy (add'l)	11/15/12	J		
220. Fidelity Diversified International	A	Dividend	K	T	Buy (add'l)	08/09/12	J		
221.					Buy (add'l)	10/22/12	J		

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 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	Q = Appraisal (See Column C2)	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	T = Cash Market	

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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)
222. Fidelity Short-Intermediate Muni Income	A	Dividend	K	T	Sold (part)	03/28/12	J		
223.					Buy (add'l)	08/09/12	J		
224. Fidelity Municipal Money Market	A	Dividend	J	T					
225. Cambiar Opportunity Investor CL		None			Sold (part)	08/09/12	J	A	
226.					Sold	10/22/12	K	D	
227. Columbia Marsico Focused Eq. CL A		None			Sold	03/28/12	J	C	
228. DWS Managed Municipal Bond CL S	B	Dividend	K	T	Sold (part)	06/01/12	J		
229. Diamond Hill Small Cap Class A		None			Sold	03/28/12	J	B	
230. Goldman Sachs Midcap Value Class A		None			Sold	10/22/12	J	C	
231. Harbor Capital Appreciation Adm CL	A	Dividend	J	T					
232. Hartford Growth Opportunity Class A		None			Sold	10/22/12	K	D	
233. Hotchkis & Wiley Mid Cap Value CL A	A	Dividend	J	T	Sold (part)	10/22/12	J	D	
234. Janus Fund		None			Sold (part)	08/09/12	K	D	
235.					Sold	10/22/12	J	D	
236. Artio International Equity Fund II CL A		None			Sold	08/09/12	K	C	
237. RS Value Fund CL A		None			Sold	10/23/12	J	D	
238. T Rowe Tax Free Inc. Fund Adv. Class	C	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	
3. Value Method Codes	P3 = \$25,000,001 - \$50,000,000		P4 = More than \$50,000,000		
(See Column C2)	Q = Appraisal	R = Cost (Real Estate Only)	S = Assessment	T = Cash Market	
	U = Book Value	V = Other	W = Estimated		

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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)

239. Royce Value Plus Service Class		None	J	T	Sold (part)	03/28/12	J	A	
240. SSGA Emerging Markets	A	Dividend	K	T	Sold (part)	10/22/12	J	B	
241. Thornburg Value Class A		None			Sold (part)	03/28/12	J	B	
242.					Sold	10/22/12	J	A	
243. Spartan Total Market Index FID Advantage CL	A	Dividend			Sold	10/22/12	K	D	
244. GE International Equity Service CL		None			Sold	10/22/12	J	C	
245. Oakmark Fund I	B	Dividend	K	T	Sold (part)	10/22/12	J	D	
246. Manning & Napier World Opp Ser CL A		None			Sold	01/11/12	J	A	
247. T Rowe Price Equity Income Advisor CL	A	Dividend	J	T					
248. T Rowe Price Real Estate Fund Adv CL	A	Dividend	J	T					
249. Thornburg International Value CL A	A	Dividend	J	T	Sold (part)	03/28/12	J	B	
250. Fidelity Municipal Income	B	Dividend	K	T	Sold (part)	03/28/12	J	A	
251.					Buy (add'l)	08/09/12	J		
252.					Buy (add'l)	10/22/12	J		
253.					Sold (part)	11/23/12	J	A	
254. Black Rock High Yield Bond CL A	A	Dividend	J	T	Sold (part)	11/23/12	J	B	
255. Franklin Federal Tax-free CL A	A	Dividend	J	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	

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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)
256. Pimco Commodity Real Return Strat Adm CL	A	Dividend	J	T	Sold (part)	01/11/12	J	A	
257.					Buy (add'l)	06/11/12	J		
258.					Buy (add'l)	08/09/12	J		
259.					Sold (part)	11/23/12	J	A	
260. T Rowe Price High Yield Advisor CL	A	Dividend			Sold	11/23/12	J	A	
261. Templeton Global Bond CL A	A	Dividend	J	T	Buy (add'l)	01/11/12	J		
262.					Buy (add'l)	10/22/12	J		
263. iShares TR S&P 100 Index Fund	A	Dividend	K	T					
264. American Europacific Growth Class F1		None			Sold	03/28/12	J	A	
265. JP Morgan U.S. Equity Fund Select Class Conf		None			Sold (part)	01/11/12	J	A	
266.					Sold	03/28/12	J	B	
267. MFS International Diversification FD A Conf	A	Dividend	K	T					
268. Royce Pennsylvania Fund Service Class		None			Sold	03/28/12	J		
269. Fidelity Dividend Growth	A	Dividend	K	T	Buy (add'l)	10/22/12	J		
270.					Buy (add'l)	11/23/12	J		
271. Fidelity Tax-free Bond	B	Dividend	K	T	Sold (part)	03/28/12	J	A	
272. Allianz NFJ Dividend Value FD CL D	A	Dividend			Sold	03/28/12	J	B	

1. Income Gain Codes: (See Columns B1 and D4)	A = \$1,000 or less F = \$50,001 - \$100,000 J = \$15,000 or less N = \$250,001 - \$500,000 P3 = \$25,000,001 - \$50,000,000	B = \$1,001 - \$2,500 G = \$100,001 - \$1,000,000 K = \$15,001 - \$50,000 O = \$500,001 - \$1,000,000	C = \$2,501 - \$5,000 H1 = \$1,000,001 - \$5,000,000 L = \$50,001 - \$100,000 P1 = \$1,000,001 - \$5,000,000 P4 = More than \$50,000,000	D = \$5,001 - \$15,000 H2 = More than \$5,000,000 M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	E = \$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	Q = Appraisal U = Book Value	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	T = Cash Market	

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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)

273. Causeway International Value Investor	A	Dividend	J	T					
274. Janus Enterprise Fund Class T Shares	A	Dividend	K	T	Buy (add'l)	10/22/12	J		
275. Fidelity Advisor Growth Oppty CL 1		None	J	T	Buy	11/23/12	J		
276. Fidelity Growth		None			Buy	10/22/12	J		
277.					Sold	11/23/12	J		
278. Fidelity Low Priced Stock	A	Dividend	J	T	Buy	10/22/12	J		
279. Fidelity Small Cap Value	A	Dividend	J	T	Buy	10/22/12	J		
280. Champlain Mid Cap Advisor Share		None			Buy	10/22/12	J		
281.					Sold	11/23/12	J	A	
282. Credit Suisse Commnd Return Strategy Inst Sh		None	J	T	Buy	01/11/12	J		
283.					Sold (part)	03/28/12	J		
284.					Sold (part)	06/01/12	J		
285.					Buy (add'l)	11/23/12	J		
286. JP Morgan Mid-Cap Value Fund Select CL	A	Dividend	J	T	Buy	10/22/12	J		
287.					Buy (add'l)	11/23/12	J		
288. IShares TR Russell Mid-Cap Index Fund Avg Price	A	Dividend	J	T	Buy	11/27/12	J		
289. IShares TR Russell 1000 Growth Index Fund	A	Dividend	K	T	Buy	08/13/12	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 \$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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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)
290.					Buy (add'l)	10/24/12	K		
291. iShares TR Russell 1000 Index Fund	A	Dividend	J	T	Buy	11/27/12	J		
292. iShares TR Russell 2000 Index Fund	A	Dividend	J	T	Buy	11/27/12	J		
293. Vanguard Index FDS Vanguard Value Vipers	A	Dividend	K	T	Buy	11/27/12	K		
294. iShares TR Russell 1000 Value Index Fund		None			Buy	10/24/12	K		
295.					Sold	11/27/12	K		
296. MFS International Value Fund CL A	A	Dividend	J	T	Buy	01/11/12	J		
297.					Buy (add'l)	08/09/12	J		
298. T. Rowe Price International Stock	A	Dividend	K	T	Buy	08/09/12	J		
299.					Buy (add'l)	10/22/12	J		
300. T. Rowe Price Small Cap Value Advisor CL		None			Buy	10/22/12	J		
301.					Sold	11/23/12	J		
302. Spdr S&P 500 ETF Trust Unit Ser I		None			Buy	10/24/12	J		
303.					Sold	11/27/12	J		
304. Templeton Frontier Mkts Fund	A	Dividend	J	T	Buy	06/01/12	J		
305.					Buy (add'l)	08/09/12	J		
306. Wells Fargo Short Term Muni Inc.-Instit. Conf	A	Dividend	K	T	Buy	11/23/12	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 = \$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 \$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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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)
307. Trust No. 1 (see note)									
308. - Chase Bank account No. 1		None			Sold	12/28/12	M		
309. - Chase Bank account No. 2		None	M	T					
310. - BMO Harris Bank account		None	M	T					
311. - Wells Fargo Advisors trust account									
312. -- Wells Fargo bank deposit sweep	A	Int./Div.	O	T	Buy	12/28/12	M		
313.					Buy	12/28/12	K		
314.					Buy	12/31/12	O		
315. -- iShares MSCI EAFE Index Fund		None			Sold	12/31/12	K	A	
316. -- iShares Core S&P 500 ETF S&P Index Fund		None			Sold	12/31/12	K		
317. -- iShares Tr - Russell 1000 Value Index Fund		None			Sold	12/31/12	J		
318. -- iShares Barclay TIPS EFT Bond Fund		None			Sold	12/31/12	L		
319. -- iShares Barclays ETF 1-3 Yr Treasury Bond Fund		None			Sold	12/31/12	M		
320. -- PowerShares DB ETF Commodity Index Tracking Fund		None			Sold	12/31/12	K	A	
321. -- PowerShares EM MAR ETF SOV DE PT		None			Sold	12/31/12	K	A	
322. -- SPDR Barclays ETF High Yield Bond ETF		None			Sold	12/31/12	K		
323. -- Vanguard Total Bond ETF Market		None			Sold	12/31/12	M		

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 \$5,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
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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.)

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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)
324. -- Vanguard Mid Cap ETF		None			Sold	12/31/12	J		
325. Trust No. 2 (see note)									
326. - Wells Fargo trust account									
327. -- iShares MSCI EAFE Index Fund	A	Int./Div.			Sold	12/28/12	K		
328. -- iShares Core S&P 500 ETF S&P 500 Index Fund	A	Int./Div.			Sold	12/28/12	L		
329. -- iShares Tr - Russell 1000 Value Index Fund	A	Int./Div.			Sold	12/28/12	J		
330. -- iShares Barclays TIPS ETF Bond Fund					Sold	12/28/12	L		
331. -- iShares Barclays ETF 1-3 Yr Treasury Bond Fund					Sold	12/28/12	N		
332. -- PowerShares DB ETF Commodity Index Tracking Fund					Sold	12/28/12	K		
333. -- PowerShares EM MAR ETF SOV DE PT	A	Int./Div.			Sold	12/28/12	L		
334. -- SPDR Barclays ETF Short Term High Yield Bond					Sold	12/28/12	K		
335. -- SPDR Barclays ETF High Yield Bond ETF					Sold	12/28/12	K		
336. -- Vanguard Total Bond ETF Market	A	Int./Div.			Sold	12/28/12	M		
337. -- Vanguard Mid Cap ETF	A	Int./Div.			Sold	12/28/12	M		
338. -- Wells Fargo bank deposit sweep	A	Int./Div.	O	T	Buy	12/28/12	O		

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 to Parts I and VIII.

On December 23, 2012, a family member died. As a result of that family member's death, I became successor trustee of two trusts. Another family member and I are also beneficiaries of these trusts.

- Trust No. 1 transactions. This trust contained as assets reportable here (1) three bank accounts, and (2) a number of investments in a trust account at Wells Fargo Advisors. I closed one of the bank accounts and transferred the funds to the Wells Fargo Advisors trust account. I then sold all of the investments in the Wells Fargo Advisors trust account. All of the resulting cash, both from the bank account and the sold investments, was deposited in a Wells Fargo bank deposit sweep account.

- Trust No. 2 transactions. This trust contained as assets reportable here a number of investments in a trust account at Wells Fargo Advisors. I sold all of the investments in the account. All of the resulting cash was deposited in a Wells Fargo bank deposit sweep account.

Because I was only the successor trustee of these trusts in 2012 for 8 days -- from December 23-31, 2012 -- I have reported income and transactions only for that 8-day period, not for the period before December 23 when I was not the trustee.

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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/ A. Benjamin Goldgar**

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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