

Executive Branch Personnel PUBLIC FINANCIAL DISCLOSURE REPORT

Date of Appointment, Confirmation, Election or Nomination (Month, Day, Year)		Reporting Status (Check appropriate boxes)		Calendar Year Covered by Report		New Report, Nominee, or Candidate		Termination		Termination Date (If Applicable) (Month, Day, Year)		Fee for Late Filing	
3/11/2009		<input type="checkbox"/> Incumbent <input type="checkbox"/> Former Incumbent		[Blank]		<input checked="" type="checkbox"/> of Candidate		<input type="checkbox"/> Filer		[Blank]		Any individual who is required to file this report and does so more than 30 days after the date the report is required to be filed, or, if an extension is granted, more than 30 days after the last day of the filing extension period shall be subject to a \$200 fee.	
Reporting Individual's Name		Last Name				First Name and Middle Initial							
Fong		Ivan K.											
Position for Which Filing		Title of Position				Department or Agency (If Applicable)							
General Counsel		U.S. Department of Homeland Security											
Location of Present Office (or forwarding address)		Address (Number, Street, City, State, and ZIP Code)				Telephone No. (Include Area Code)							
7000 Cardinal Place, Dublin, OH 43017		(614) 757-7768											
Position(s) Held with the Federal Government During the Preceding 12 Months (If Not Same as Above)		Title of Position(s) and Date(s) Held											
[Blank]													
Presidential Nominee Subject to Senate Confirmation		Name of Congressional Committee Considering Nomination				Do You Intend to Create a Qualified Diversified Trust?							
[Blank]		Committee on Homeland Security and Governmental Affairs				<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No							
Certification		Signature of Reporting Individual				Date (Month, Day, Year)							
I CERTIFY that the statements I have made on this form and all attached schedules are true, complete and correct to the best of my knowledge.						3/13/2009							
Other Review (If desired by filer)		Signature of Other Reviewer				Date (Month, Day, Year)							
[Blank]		[Blank]				[Blank]							
Agency Ethics Official's Opinion		Signature of Designated Agency Ethics Official/Reviewing Official				Date (Month, Day, Year)							
On the basis of information contained in this report, I conclude that the filer is in compliance with applicable laws and regulations (subject to any comments in the box below).						3/13/2009							
Office of Government Ethics Use Only		Signature				Date (Month, Day, Year)							
[Blank]						3/16/09							
Comments of Reviewing Officials (If additional space is required, use the reverse side of this sheet)												Agency Use Only	
(Check box if filing extension granted & indicate number of days _____) <input type="checkbox"/>												Schedule D - The reporting period is the preceding two calendar years and the current calendar year up to the date of filing.	
(Check box if comments are continued on the reverse side) <input type="checkbox"/>												Agency Use Only	
[Blank]												OGE Use Only	

Reporting Individual's Name

Ivan K. Fong

SCHEDULE A

Page Number

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Assets and Income BLOCK A		Valuation of Assets at close of reporting period BLOCK B										Income: type and amount. If "None (or less than \$201)" is checked, no other entry is needed in Block C for that item. BLOCK C							
For you, your spouse, and dependent children, report each asset held for investment or the production of income which had a fair market value exceeding \$1,000 at the close of the reporting period, or which generated more than \$200 in income during the reporting period, together with such income. For yourself, also report the source and actual amount of earned income exceeding \$200 (other than from the U.S. Government). For your spouse, report the source but not the amount of earned income of more than \$1,000 (except report the actual amount of any honoraria over \$200 of your spouse). None <input type="checkbox"/>												Type	Amount	Other Income (Specify Type & Actual Amount)	Date (Mo., Day, Yr.) Only if Honoraria				
		None (or less than \$1,000)	\$1,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	Over \$1,000,000*	None (or less than \$201)	\$1,001 - \$2,500	\$2,501 - \$5,000	\$5,001 - \$15,000			\$15,001 - \$50,000	\$50,001 - \$100,000	Over \$1,000,000*	Over \$5,000,000
Examples	Central Airlines Common Doe Jones & Smith, Hometown, State Kempstone Equity Fund IRA: Heartland 500 Index Fund.			x									x					Low Amount Income At \$1,000	
1	Covington & Burling ("C&B") 401(k): - Dodge & Cox Stock (DODGX)																		
2	C&B 401(k): - Vanguard Institutional Index (VINIX)																		
3	C&B 401(k): - American Beacon Small Cap Val Inst (AVFIX)																		
4	C&B 401(k): - Ralnier Small/Mid Cap Equity (RIMSX)																		
5	C&B 401(k): - Vanguard Extended Markets Index Signa (VEMSX)		x																
6	C&B 401(k): - Lazard Emerging Markets Equity Inst (LZEMX)																		

* This category applies only if the asset/income is solely that of the filer's spouse or dependent children. If the asset/income is either that of the filer or jointly held by the filer with the spouse or dependent children, mark the other higher categories of value, as appropriate.

Reporting Individual's Name
 Ivan K Fong

SCHEDULE A continued
 (Use only if needed)

Assets and Income BLOCK A		Valuation of Assets at close of reporting period BLOCK B								Income: type and amount. If "None (or less than \$201)" is checked, no other entry is needed in Block C for that item. BLOCK C													
None <input type="checkbox"/>		\$1,001 - \$5,000 \$5,001 - \$10,000 \$10,001 - \$25,000 \$25,001 - \$50,000 \$50,001 - \$100,000 Over \$1,000,000*								Type										Other Income (Specify Type & Actual Amount)	Date (Mo., Day, Yr.) - Only if Homogaria		
										Type		Amount											
										None (or less than \$201)	\$1,001 - \$2,500	\$2,501 - \$5,000	\$5,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$500,000	Over \$1,000,000*						
1	C&B 401(k): - Virtus Real Estate Securities A (PHRAX)	x																					
2	C&B 401(k): - PIMCO Total Return Instl (PTTRX)																						
3	C&B 401(k): - Schwab Managed Ret Trust 2030 CI III																						
4	C&B 401(k): - Vanguard Wellington Adm (VWENX)																						
5	left intentionally blank																						
6	General Electric ("GE") 401(k): - Strategic Investment Fund (GSIVX)																						
7	GE 401(k): - GE S&S Program Mutual Fund (GESSX)																						
8	GE 401(k): - Vanguard Institutional Index Fund (VIIX)	x																					
9	GE 401(k): - GE S&S Money Market Fund (GEMOX)	x																					

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 Prior Editions Cannot be Used.

Reporting Individual's Name
 Ivan K. Fong

SCHEDULE A continued
 (Use only if needed)

BLOCK A Assets and Income	BLOCK B Valuation of Assets at close of reporting period										BLOCK C Income: type and amount. If "None (or less than \$201)" is checked, no other entry is needed in Block C for that item.																				
	None or less than \$100	\$101 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	Over \$1,000,000*	None or less than \$201	\$201 - \$500	\$501 - \$1,000	Over \$1,000	None or less than \$201	\$201 - \$500	\$501 - \$1,000	Over \$1,000	None or less than \$201	\$201 - \$500	\$501 - \$1,000	Over \$1,000	None or less than \$201	\$201 - \$500	\$501 - \$1,000	Over \$1,000	None or less than \$201	\$201 - \$500	\$501 - \$1,000	Over \$1,000	Other Income (Specify Type & Actual Amount)	Date (Mo., Day, Yr.) Only if Honoraria	
1 GE 401(k): - GE S&S Income Fund (GESLX)																															
2 GE 401(k): - Institutional International Eq Fund (GIEUX)																															
3 GE 401(k): - Institutional Small Cap Eq Fund (GSVIX)																															
4 General Electric Co. Common (GE)																															
5 Cardinal Health ("CAH") 401(k) & Deferred Compensation Plan ("DCP"): - Fidelity Growth Company Fund (FDGRX)																															
6 CAH 401(k): - Fidelity US Eq Index Commingled Pool Class 1		x																													
7 CAH 401(k) & DCP: - Columbia Acom USA Fund Class Z (AUSAX)																															
8 CAH 401(k) & DCP: - Dodge & Cox Stock (DODGX)																															
9 CAH 401(k) & DCP: - Fidelity Diversified Intl Fund (FDIVX)																															

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SCHEDULE A continued
 (Use only if needed)

Ivan K. Fang

Assets and Income BLOCK A	Valuation of Assets at close of reporting period BLOCK B										Income: type and amount. If "None (or less than \$201)" is checked, no other entry is needed in Block C for that item. BLOCK C		Other Income (Specify Type & Actual Amount)	Date (Mo., Day, Yr.) Only if Honorary	
	Type	Amount	None (or less than \$201)	Other	Date										
1 CAH 401(k) & DCP: - CRM Mid Cap Value Investor (CRMVX)															
2 CAH 401(k) & DCP: - Balanced Fund** (holds DODGX, FDGRX, AUSAX, FDIWX, PTTRX)			x												** value and income not readily ascertainable for underlying holdings.
3 CAH 401(k) & DCP: - PIMCO Total Return Instl (PTTRX)			x												
4 CAH DCP: - Fidelity Spartan US Eq Ind Fund (FUSEX)															
5 CAH DCP: - Fidelity Money Market Fund (SPRXX)															
6 Cardinal Health, Inc. Common (CAH)				x											
7 IRA: - Vanguard Tot Stock Mkt Idx Inv (VTSMX)															
8 IRA: - Vanguard Windsor II Fund Inv (VWNFX)															
9 IRA: - Vanguard Target Ret 2025 Fund (VTVX)															

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Prior Editions Cannot be Used.

Reporting Individual's Name:

Ivan K. Fong

SCHEDULE A continued

(Use only if needed)

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Assets and Income BLOCK A		Valuation of Assets at close of reporting period BLOCK B									Income: type and amount. If "None (or less than \$201)" is checked, no other entry is needed in Block C for that item.		Other Income (Specify Type & Actual Amount)	Date (Mo., Day, Yr.) Only if Honorary		
		\$0 - \$1,000	\$1,001 - \$5,000	\$5,001 - \$10,000	\$10,001 - \$25,000	\$25,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	Over \$1,000,000*	Dividends	Interest			None (or less than \$201)	Amount
1	Vanguard Tot Bond Mkt Index Adm (VBTL)		x													
2	Vanguard Ltd-Term Tax Ex - Inv & Adm Sh (VMLTX & VMLUX)															
3	Vanguard Prime Money Market Fund (VMMDX)											x				
4	Vanguard REIT Index Fund Inv (VGSIX)	x														
5	Vanguard Short-Term Inv-Grade Fund Inv (VFSTX)	x														
6	Vanguard Inf-Prot Sec Inv (VIPSX)															
7	Vanguard Emerging Mkts Stock Index (VEIEX)											x				
8	Fidelity Contrafund (FCNTX)	x										x				
9	Fidelity Strategic Real Return (FSRRX)	x										x				

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Reporting Individual's Name

Ivan K. Fong

SCHEDULE A - continued

(Use only if needed)

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BLOCK A Assets and Income	BLOCK B Valuation of Assets at close of reporting period										BLOCK C Income: type and amount. If "None (or less than \$201)" is checked, no other entry is needed in Block C for that item.													
	None	Under \$100,000	\$100,001 - \$150,000	\$150,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	Over \$1,000,000*	None	Dividends	Interest	None (or less than \$201)	Over \$1,001 - \$2,500	Over \$2,501 - \$5,000	Over \$5,001 - \$15,000	Over \$15,001 - \$50,000	Over \$50,001 - \$100,000	Over \$100,001 - \$500,000	Over \$500,001 - \$1,000,000	Over \$1,000,000*	Over \$5,000,000	Other Income (Specify Type & Actual Amount)	Date (Mo., Day, Yr.) Only if Honoraria		
1 Fidelity Select Gold (FSAGX)		x									x													
2 Oakmark Fund (OAKMX)		x																						
3 Oakmark Equity & Income (OAKBX)		x									x													
4 DC American Century Gifttrust (TWGTX)		x									x													
8 529 Acct (New Hampshire): DC - Fidelity NH College Portfolio (age-based portfolio)											x													
8 DC Coca-Cola Co. Common (KO)		x							x		x													
7 DC Hershey Co. Common (HSY)									x		x													
8 529 Acct (New Hampshire): DC - Fidelity NH Portfolio 2009 (age-based portfolio)			x								x													
8 529 Acct (Ohio): DC - Vanguard Aggressive Age-Based Option (age-based portfolio 18-18 yrs)		x									x													

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Reporting Individual's Name

Ivan K. Fong

SCHEDULE A continued

(Use only if needed)

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BLOCK A	BLOCK B										BLOCK C		Other Income (Specify Type & Actual Amount)	Date (Mo., Day, Yr.) Only if Honorary											
	Valuation of Assets at close of reporting period										Type	Amount													
	None	\$1,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	Over \$500,000	Over \$1,000,000	Over \$5,000,000	Over \$25,000,000	Dividends, Capital Gains, Interest	None (or less than \$20)	\$20 - \$500	\$500 - \$1,000	\$1,001 - \$5,000	\$5,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$500,000	Over \$500,000*	Over \$1,000,000	Over \$5,000,000			
1 DC MGM Mirage Common (MGM)		x									x														
2 DC Cash Acct (RBC Wealth Management)		x											x												
3 DC - 529 Acct (New Hampshire); Fidelity NH Portfolio 2012 (age-based portfolio)				x																					
4 DC - 529 Acct (Ohio); Vanguard Aggressive Age-Based Option (age-based portfolio 11-15 yrs)		x																							
5 DC Vanguard STAR Fund (VGSTX)		x																							
6 DC FBR Focus Fund (FBRVX)		x																							
7 Wachovia Checking Acct		x											x												
8 Chase Checking Acct		x											x												
9 Chase Money Market Acct		x											x												

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Reporting Individual's Name

Ivan K. Fong

SCHEDULE A continued
 (Use only if needed)

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Assets and Income BLOCK A	Valuation of Assets or loss of reporting period BLOCK B										Income: type and amount. If "None (or less than \$20)" is checked, no other entry is needed in Block C for that item. BLOCK C											
	None	Over \$1,000,000	\$500,001 - \$1,000,000	\$250,001 - \$500,000	\$100,001 - \$250,000	\$50,001 - \$100,000	Over \$1,000,000*	Over \$500,000*	Over \$250,000*	Over \$100,000*	Over \$50,000*	Over \$1,000,000*	Over \$500,000*	Over \$250,000*	Over \$100,000*	Over \$50,000*	Type	Amount	Other Income (Specify Type & Actual Amount)	Date (Mo., Day, Yr.) Only if Honoraria		
1 DC Chase Checking & Savings Accts	<input checked="" type="checkbox"/>																					
2 Cardinal Health, Inc., Dublin, OH																			Salary + bonus ~ \$883,000			
3 CAH stock options (vested): - 33,760 options @ \$82.07 (exp 11/2012) (upon separation, will expire 3/2012)				Value not readily ascertainable																		
4 CAH stock options (vested): - 23,213 options @ \$88.34 (exp 8/2013) (upon separation, will expire 3/2012)				Value not readily ascertainable																		
5 CAH stock options (vested): - 9,311 options @ \$67.28 (exp 8/2014) (upon separation, will expire 3/2012)				Value not readily ascertainable																		
6 UBS Bank USA Dep Acct	<input checked="" type="checkbox"/>																					
7 Cardinal Health Severance: - Pro-rate FY2009 bonus (to be paid in 9/09)																						
8 Cardinal Health Severance: - Severance payment (to be paid by 10/09)																						
9 Cardinal Health Severance: - Vesting of 11,250 CAH options @ \$62.07 (exp. 3/2012)				Value not readily ascertainable																		

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Reporting Individual's Name
 Ivan K. Fong

SCHEDULE A continued
 (Use only if needed)

Page Number
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Assets and Income BLOCK A	Valuation of Assets at close of reporting period BLOCK B										Income: type and amount. If "None (or less than \$20)" is checked, no other entry is needed in Block C for that item. BLOCK C										Date (Mo., Day, Yr.) Only if Honoraria	
	\$0 - \$1,000	\$1,001 - \$5,000	\$5,001 - \$10,000	\$10,001 - \$25,000	\$25,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	Over \$1,000,000	None (or less than \$20)	\$1,001 - \$2,500	\$2,501 - \$5,000	\$5,001 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	Over \$1,000,000	Over \$5,000,000	Other Income (Specify Type & Actual Amount)			
1 Cardinal Health Severance - Vesting of 11,607 CAH options @ \$68.34 (exp. 3/2012)	Value not readily ascertainable																					
2 Cardinal Health Severance - Vesting of 9,311 CAH options @ \$67.26 (exp. 3/2012)	Value not readily ascertainable																					
3 Cardinal Health Severance - Vesting of 13,038 CAH options @ \$56.13 (exp. 3/2012)	Value not readily ascertainable																					
4 Cardinal Health Severance - Vesting of 7,072 CAH RSUs (value est.)										X												
5 Cardinal Health Severance - Vesting of 22,071 CAH RSUs (value est.)																						
6 CAH stock options (vest in 8/2010) - 11,607 options @ \$68.34 (exp. 8/2013) (forfeited upon separation)	Value not readily ascertainable																					
7 CAH stock options (vest in 8/2010) - 9,312 options @ \$67.26 (exp. 8/2014) (forfeited upon separation)	Value not readily ascertainable																					
8 CAH stock options (vest in 8/2010 & 8/2011) - 26,078 options @ \$56.13 (exp. 8/2015) (forfeited upon separation)	Value not readily ascertainable																					
9 CAH RSUs (vest in 8/2010 & 8/2011) - 7,557 RSUs (forfeited upon separation)										X												

* This category applies only if the asset/income is solely that of the filer's spouse or dependent children. If the asset/income is either that of the filer or jointly held by the filer with the spouse or dependent children, mark the other higher category.

Do not Complete Schedule B If you are a new entrant, nominee, Vice Presidential or Presidential Candidate

Reporting Individual's Name Ivan K. Fong	SCHEDULE B	Page Number 11
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Part I: Transactions None

Report any purchase, sale, or exchange by you, your spouse, or dependent children during the reporting period of any real property, stocks, bonds, commodity futures, and other securities when the amount of the transaction exceeded \$1,000. Include transactions that resulted in a loss. Do not report a transaction involving property used solely as your personal residence in a transaction solely between you, your spouse, or dependent child. Check the "Certificate of Investment" block to indicate sales made pursuant to a certificate of investment from OGE.

	Identification of Asset	Transaction Type (x)			Date (Mo., Day, Yr.)	Amount of Transaction (x)														
		Purchase	Sale	Exchange		\$1,001 - \$10,000	\$10,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	Over \$1,000,000	\$1,000,001 - \$5,000,000	\$5,000,001 - \$25,000,000	\$25,000,001 - \$50,000,000	Over \$50,000,000	Cert. Invest. of \$500,000 or more			
Example:	Central Airlines Common	x			2/1/99															
1																				
2																				
3																				
4																				
5																				

* This category applies only if the underlying asset is solely that of the filer's spouse or dependent children. If the underlying asset is either held by the filer or jointly held by the filer with the spouse or dependent children, use the other higher categories of value, as appropriate.

Part II: Gifts, Reimbursements, and Travel Expenses None

For you, your spouse and dependent children, report the source, a brief description, and the value of: (1) gifts (such as tangible items, transportation, lodging, food, or entertainment) received from one source totaling more than \$260; and (2) travel-related cash reimbursements received from one source totaling more than \$260. For conflicts analysis, it is helpful to indicate a basis for receipt, such as personal friend, agency approval under 5 U.S.C. 64111 or other statutory authority, etc. For travel-related gifts and reimbursements, include travel itinerary, dates, and the nature of expenses provided. Exclude anything given to you by the U.S. Government; even to your agency in connection with official travel; received from relatives; received by your spouse or dependent child totally independent of their relationship to you; or provided as personal hospitality at the donor's residence. Also, for purposes of aggregating gifts to determine the total value from one source, exclude items worth \$104 or less. See instructions for other exclusions.

	Source (Name and Address)	Brief Description	Value
Example:	Natl Assn. of Rock Collectors, NY, NY Frank Jones, San Francisco, CA	Airline ticket, hotel room & meals incident to national conference 6/15/99 (personal activity unrelated to duty). Leather briefcase (personal friend)	\$500 \$300
1			
2			
3			
4			
5			

Reporting Individual's Name Ivan K. Fong	SCHEDULE C	Page Number 12
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Part I: Liabilities		None <input checked="" type="checkbox"/>		Category of Amount by Value (\$) ⁽¹⁾											
Report liabilities over \$10,000 owed to any one creditor at any time during the reporting period by you, your spouse or dependent children. Check the highest amount owed during the reporting period. Exclude a mortgage on your personal residence unless it is rented out, loans secured by automobiles, household furniture or appliances, and liabilities owed to certain relatives listed in instructions. See instructions for revolving charge accounts.		Date Incurred	Interest Rate	Term if applicable	\$10,000 - \$15,000	\$15,001 - \$50,000	\$50,001 - \$100,000	\$100,001 - \$250,000	\$250,001 - \$500,000	\$500,001 - \$1,000,000	Over \$1,000,000	\$1,000,001 - \$5,000,000	\$5,000,001 - \$25,000,000	\$25,000,001 - \$50,000,000	Over \$50,000,000
Creditor (Name and Address)	Type of Liability														
<i>Example:</i> First District Bank, Washington, DC John Jones, 123 1/2 St., Washington, DC	Mortgage on rental property, Delaware Promissory note	1991 1999	8% 10%	25 yrs on demand			x								
1															
2															
3															
4															
5															
6															

¹ This category applies only if the liability is solely that of the filer's spouse or dependent children. If the liability is that of the filer or a joint liability of the filer with the spouse or dependent children, mark the other higher categories, as appropriate.

Part II: Agreements or Arrangements		None <input type="checkbox"/>	
Report your agreements or arrangements for continuing participation in an employee benefit plan (e.g., 401(k), deferred compensation); (2) continuation payment by a former employer (including severance payments); (3) leaves of absence; and (4) future employment. See instructions regarding the reporting of negotiations for any of these arrangements or benefits.			
Status and Terms of any Agreement or Arrangement	Partner		Date
<i>Example:</i> Pursuant to partnership agreement, will receive lump sum payment of capital account & partnership share calculated on service performed through 1/31/00.	Doe Jones & Smith, Hometown, State		7/85
1 I will continue to participate in my C&B-sponsored 401(k), a defined contribution plan. Neither C&B nor I will make any further contributions.	Covington & Burling LLP, Washington, DC		11/90
2 I will continue to participate in my GE-sponsored 401(k), a defined contribution plan. Neither GE nor I will make any further contributions.	General Electric Co., Fairfield, CT		4/00
3 Upon confirmation, I will terminate my employment with CAH. Pursuant to my Offer Letter and CAH standard practice, and memorialized in my Severance Agreement, I will receive a pro-rated bonus for FY09 in 9/2009, a severance payment in 10/2009, accelerated vesting of 45,206 unvested stock options that will expire in 3/2012, and accelerated vesting of 7,072 restricted stock units. I will continue to participate in my CAH-sponsored 401(k) and DCP, defined contribution plans.	Cardinal Health, Inc., Dublin, OH		
4 After separation, neither CAH nor I will make any further contributions. Pursuant to my Restricted Share Unit Agreement and Severance Agreement, I will receive accelerated vesting of 22,071 restricted stock units.	-- Offer Letter		11/06
5 I will forfeit all of my remaining 46,997 unvested stock options and 7,557 unvested restricted stock units.	-- Restricted Share Unit Agreement		10/08
	-- Severance Agreement		2/09

Prior Editions Cannot Be Used.

Reporting Individual's Name
 Ivan K. Fong

SCHEDULE D

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Part I: Positions Held Outside U.S. Government

Report any positions held during the applicable reporting period, whether compensated or not. Positions include but are not limited to those of an officer, director, trustee, general partner, proprietor, representative, employee, or

consultant of any corporation, firm, partnership, or other business enterprise or any non-profit organization or educational institution. Exclude positions with religious, social, fraternal, or political entities and those solely of an honorary nature.

None

	Organization (Name and Address)	Type of Organization	Position Held	From (Mo., Yr.)	To (Mo., Yr.)
Examples:	Nat'l Assn. of Rock Collectors, NY, NY Doc Jones & Smith, Hometown, State	Non-profit education Law firm	President Partner	6/92 7/85	Present 1/00
1	Cardinal Health, Dublin, OH	Corporation	Chief Legal Officer & Secretary	11/05	Present
2	Asian Pacific American Bar Association of Central Ohio, Columbus, OH	Non-profit bar association	Director	2008	Present
3	Association of Corporate Counsel, Washington, DC	Non-profit bar association	Director, Treasurer (2007-08); Chair (2008-present)	2004	Present
4	Cardinal Health Foundation, Dublin, OH	Non-profit foundation	Director	11/05	Present
5	Columbus Bar Foundation, Columbus, OH	Non-profit foundation	Director	2007	Present
6	Pro Bono Partnership, White Plains, NY	Non-profit charitable	Director	2003	Present

Part II: Compensation In Excess Of \$5,000 Paid by One Source

Report sources of more than \$5,000 compensation received by you or your business affiliation for services provided directly by you during any one year of the reporting period. This includes the names of clients and customers of any

corporation, firm, partnership, or other business enterprise, or any other non-profit organization when you directly provided the services generating a fee or payment of more than \$5,000. You need not report the U.S. Government as a source.

Do not complete this part if you are an Incumbent, Termination Filer, or Vice Presidential or Presidential Candidate

None

	Source (Name and Address)	Brief Description of Duties
Examples:	Doc Jones & Smith, Hometown, State Metro University (client of Doc Jones & Smith), Moneytown, State	Legal services Legal services in connection with university construction
1	Cardinal Health, Dublin, OH	Legal services
2		
3		
4		
5		
6		

Funds that do not qualify under the "safe harbor" mutual fund exemption from disclosure rule include:

- (1) most IRAs;
- (2) funds that issue regular reports where the judge knows or should know the stocks in his portfolio;
- (3) funds with notoriously public activity (e.g., [T. Rowe Price](#) and [Fidelity](#) pre-IPO Facebook investing);
- (4) undisclosed purchases of "dark" instruments which conceal activity subject to transparency laws;
- (5) law firm 401(k) retirement accounts;
- (6) funds where stocks are held in the judge's (or spouse) name — "even one share"; and
- (7) funds where there is an appearance of impropriety.

Sources:

Guide to Judiciary Policy, Ethics & Judicial Conduct, Vol. 2B, Ch. 2, see esp. Section 106, U.S. Courts, United States Department of Justice

<<http://www.uscourts.gov/uscourts/RulesAndPolicies/conduct/Vol02B-Ch02.pdf>>;

See also

<<https://docs.google.com/file/d/0B2SfG2nEsMfqSVQ4dFUyWGNHS0E/edit>> and <<http://www.scribd.com/doc/199638078/Guide-to-Judiciary-Policy-Vol-02-Ethics-and-Judicial-Conduct-Part-B-Ethics-Advisory-Opinions-Ch-02-Published-Advisory-Opinions-accessed-Jan>>.

Bloomberg

Fidelity's Danoff Bets on Facebook, Zynga

By Miles Weiss - Jun 1, 2011

William Danoff, the manager of Fidelity Investment's largest stock fund, established a toehold in the social-networking industry during the first quarter by acquiring shares of [Facebook](#) Inc. and Zynga Inc.

Danoff's Fidelity Contrafund invested \$74 million in Facebook Class B common shares and \$82 million in Zynga convertible preferred stock, according to a quarterly report the fund filed yesterday with the U.S. Securities and Exchange Commission. Danoff, 50, has managed the \$80 billion Fidelity Contrafund since September 1990.

Fidelity and rivals T. Rowe Price Group Inc. and Capital Group Cos. are snapping up stakes in social-networking companies before they go public, after the mutual-fund industry avoided privately traded stocks for years. Boston-based Fidelity and Baltimore's T. Rowe Price may recognize an opportunity as a growing percentage of clients access their fund holdings through Facebook, said [Geoff Bobroff](#), a fund consultant in [East Greenwich, Rhode Island](#).

"We are seeing more of these fund companies embrace and adopt social media as something they are providing to their shareholders," Bobroff said today in an interview. "It's somewhat logical they would think there is value."

[Vincent Loporchio](#), a spokesman for Fidelity, said more than 30 of its funds held Facebook shares as of April 30. No fund had more than 0.15 percent of its assets invested in Facebook, according to Loporchio, who declined to comment further.

T. Rowe, American

T. Rowe Price reported in April that 19 of its mutual funds invested at least \$191 million during the first quarter in Facebook, the [Palo Alto](#), California-based owner of the world's most popular social-networking website. American Funds Growth Fund of America, a \$168 billion stock fund overseen by Los Angeles-based Capital Group, invested \$66.5 million on Feb. 18 in Zynga, the largest maker of games on Facebook, according to an April 29 filing.

[Fidelity Contrafund \(FCNTX\)](#) averaged annual gains of 7 percent over the past 10 years to beat 99

percent of its large-capitalization growth stock peers, according to Chicago-based research firm Morningstar Inc.

Danoff's fund aims to invest in stocks whose value hasn't been fully recognized by the public. At the end of last year, it had about 33 percent of net assets in information technology shares, including a \$5.3 billion stake in [Apple Inc. \(AAPL\)](#) and \$3.8 billion in Google Inc.

The fund acquired 2.97 million Facebook shares during the first quarter for about \$25 each, the same price T. Rowe Price reported paying, according to yesterday's filing. Facebook in January said it had raised \$1.5 billion from investors led by [Goldman Sachs Group Inc. \(GS\)](#), placing a \$50 billion valuation on the closely held business at the time.

Convertible Preferred Shares

Fidelity Contrafund also bought its Zynga convertible preferred stock on Feb. 18, according to yesterday's filing. Zynga held talks in February with T. Rowe Price and Fidelity about selling shares at a price that implied the company's market value was close to \$10 billion, two people familiar with the situation said at the time.

Facebook and Zynga last year laid the groundwork for initial public offerings by imposing fees on employees who sell their shares. Zynga may file for an IPO by the end of June, a person familiar with the plans said last week.

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Business

Fidelity Invests \$74 Million in Facebook & \$82 Million in Zynga

[Gregory Gomer](#) Jun 2nd 2011 at 2:31 pm

[Facebook](#), [Zynga](#), [Fidelity](#)

+1

According to the [Boston Globe this morning](#), Fidelity Investments made a few large investments in social media during the first quarter of this year. It is reported that William Danoff, the manager of Fidelity's Contrafund - it's biggest and very popular fund - has invested \$74 million in Facebook Class B common shares and \$82 million in Zynga

convertible preferred stock. Danoff has managed the \$80 billion Fidelity Contrafund since September 1990.

In the [article](#), "Vincent Loporchio, a spokesman for Fidelity, said more than 30 of its funds held Facebook shares as of April 30. No fund had more than 0.15 percent of its assets invested in Facebook, said Loporchio, who declined to comment further."

This is certainly no surprise as large funds have been dying to get their hands on the red hot shares of these social media companies, but it does mark a scary trend.

These secondary markets are not regulated at all by the SEC, and most funds have avoided these privately traded stocks for years. These markets can be extremely volatile and guess what is going to be first to crash, once this said "bubble" we are in either pops or deflates?

I certainly like this move, historically these markets have proven to be extremely valuable leading up to the company's IPO's but again can be very risky. The fund also has a \$5.3 billion stake in Apple Inc. and \$3.8 billion in Google Inc.

Having that said, being a Fidelity alum I have money in the Contrafund and dig the investment.

Related Posts



Fidelity Demands Resolution to Nasdaq Trading Glitch

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THE WALL STREET JOURNAL

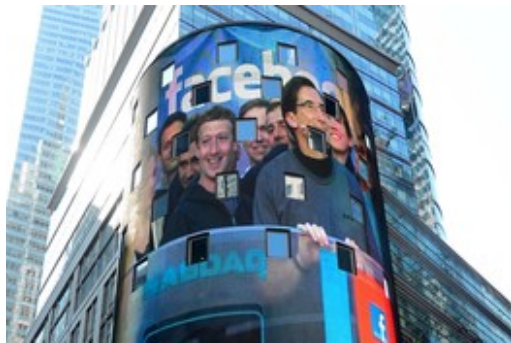
WSJ.com

August 24, 2012, 2:18 PM ET

Who Else Has a Big Bet on Facebook

By Telis Demos

We [reported this morning about the concentration](#) of Facebook stock in the portfolio of one group of investors, several mutual funds operated by Morgan Stanley Asset Management. But that is not where the concentration of Facebook stock ends.



AFP/Getty Images

According to fresh data from Ipreo, which has tallied up the public filings by all investors, a relatively large chunk of Facebook stock just three months after its \$16 billion IPO in May is held by the company's 10 largest institutional investors (that excludes insiders, like CEO Mark Zuckerberg, and the early VC investors, like Accel Partners).

The top 10 "accounts," in banker-speak, represent about 50% of Facebook's institutional ownership, according to Ipreo, the capital markets data firm. That tops the 42% concentration for the top 10 institutions for all second quarter tech IPOs three months after they went public. Across more comparable \$1 billion-plus IPOs since 2010, the concentration is even lighter: The top 10 institutional accounts held 32% of those companies' shares.

This data, keep in mind, does not tell us who bought the IPO. That's a closely guarded secret held by the lead underwriters. These figures are based on public disclosures as of June 30. They are at best a proxy for how the IPO was actually distributed.

So who are the biggest betters — by total number of shares, not necessarily by weighting within the fund — on Facebook? Morgan Stanley Asset Management is only the fifth largest holder by that measure, according to Ipreo. Above them are Goldman Sachs Asset Management, Baillie Gifford & Company, Fidelity Investments, and T. Rowe Price Group Inc. Rounding out the top 10 are BlackRock Inc., Sands Capital Management LLC, Jennison Associates LLC, The Vanguard Group Inc. and Capital Research Global Advisors Inc.

Some of those investors were big pre-IPO holders. Goldman Sachs famously marketed a fund with pre-IPO Facebook stock to international investors, which accounts for a big chunk of its holdings. T. Rowe Price and Fidelity also bought in before the IPO. The point here is that they all may still be sitting on Facebook stock gains, depending on when exactly they got into the stock.

Others, however, appear to have gotten in primarily via the IPO, or after it began trading. That includes Baillie Gifford, an Edinburgh-based fund management giant that manages assets of £76.0 billion (\$120 billion). They are a sub-advisor to some large fund management families, like Vanguard, but also manage money on behalf of giant pension funds such as the California Public Employees' Retirement System (CALPERS), the New York City Police Pension Fund and the Korea National Pension Service, according to their website. The firm did not return requests for an interview.

Some of the big investors are also there just because they have to be. BlackRock and Vanguard operate many index funds that may have bought Facebook stock solely because it likely will be a member someday of indexes such as the S&P 500 and Nasdaq 100, and is already in indexes such as the Russell 1000.

What speaks loudly are the absences of firms that are typically very big holders of recently IPO'd companies. Citadel Advisors, which bought 17 other second-quarter IPOs according to Ipreo, owned just 167,164 Facebook shares at the end of June. Wellington Management Company LLP and Lord Abbett & Company LLC, which bought 11 second quarter IPOs, both held fewer than 1m shares. For context, Baillie Gifford reported holding 19 million shares.

RANK	NAME	TOTAL AUM	FB SHARES AS OF JUNE 30
1	Goldman Sachs Asset Management, L.P. (U.S.)	82,329.1	36,634,486.0
2	Baillie Gifford & Company	60,809.1	19,380,440.0
3	Fidelity Management & Research Company	544,656.5	18,774,915.0
4	T. Rowe Price Associates, Inc.	338,744.6	18,663,997.0
5	Morgan Stanley Investment Management, Inc. (U.S.)	54,113.2	16,362,788.0
6	BlackRock Fund Advisors	768,143.8	11,690,656.0
7	Sands Capital Management, LLC	22,157.4	11,649,292.0
8	Jennison Associates, LLC	80,316.4	9,691,825.0
9	The Vanguard Group, Inc.	908,526.5	9,582,480.0
10	Capital Research Global Investors (U.S.)	366,059.2	8,273,200.0

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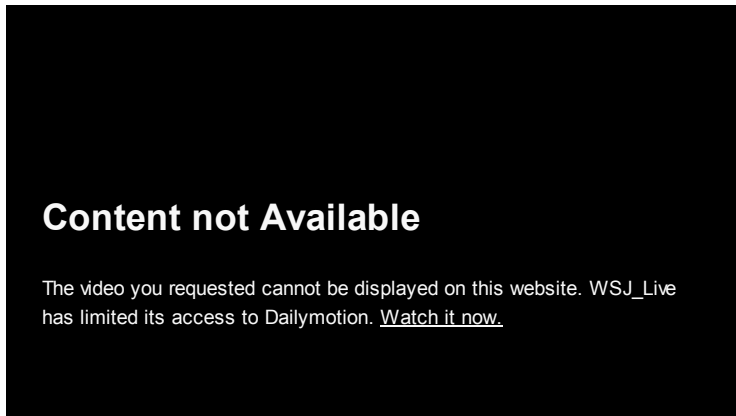
Source: [The Wall Street Journal Online](#)

MARKETS

Morgan Stanley Funds in Big Facebook Bet

By Aaron Lucchetti and Telis Demos
Updated Aug. 24, 2012 11:57 a.m. ET

U.S. mutual funds run by [Morgan Stanley](#), [MS -0.12%](#) the lead underwriter in Facebook Inc. FB \$16 billion initial public offering, have disproportionately high investments in the social-media company, leaving fund shareholders exposed to the stock's big drop since its May 18 IPO.



New data show that eight of the top nine U.S. mutual funds with Facebook shares as a percentage of total assets are run by Morgan Stanley's asset-management arm, according to fund tracker Morningstar Inc.

Morgan Stanley had a crucial role in lining up orders for Facebook as the social-media company prepared to go public. It helped advise Facebook executives to increase the size and price of the IPO, despite warnings the company was making about its profit outlook. The New York securities firm, which declined to comment, took in \$200 million in underwriting fees and trading profits,

[Morgan Stanley Bets Big on Facebook](#) by [WSJ Live](#)

according to regulatory filings and people involved in the deal.

The Morgan Stanley funds that have Facebook shares got many of them before the IPO at prices well below the \$38 offering price.

That means that fund shareholders may still have paper gains on their Facebook purchases, depending on when the fund bought their original stake. It also means the funds have been unable to sell any of their pre-IPO holdings.

The company's mutual funds have made large bets on other big-name technology companies in recent years, including bets on [Apple Inc.](#), AAPL +1.48% [Amazon.com Inc.](#) AMZN -1.06% and [LinkedIn Corp.](#) LNKD +0.14% whose values have all surged this year.

The Funds That Own Facebook

Hundreds of mutual funds have stakes in the social media company. See a list and sort by percentage of fund assets devoted to Facebook, and by absolute and relative performance.

Click here for an Excel file containing all four sections of the table below: [GoogleDocs](#) | [XLS file](#)

Q August 24, 2012

The Funds That Own Facebook

Hundreds of mutual funds have stakes in the social media company. Click column headers to sort by percentage of fund assets devoted to Facebook and by absolute relative performance.

<< first < prev 1 2 (#) 3 (#) 4 (#) next > (#) last >> (#)

Fund Name (yui-dt0-href-col 0)	Ticker (yui-dt0-href-col 1)	Total Facebook Weight (yui-dt0-href-col 2)	Total Investment as of portfolio date (yui-dt0-href-col 3)	July 2012 Return (yui-dt0-href-col 4)	July % rank against similar funds (yui-dt0-href-col 5)	Year-to-date Return (yui-dt0-href-col 6)	Year-to-date % rank against like funds (yui-dt0-href-col 7)	One-year return (yui-dt0-href-col 8)	One-year % rank against like funds (yui-dt0-href-col 9)
Morgan Stanley Inst Focus Grow th I	MSAGX	7.77%	\$28,777,414	-2.98%	98%	9.64%	90%	8.33%	99%
Morgan Stanley Focus Grow th B	AMOBX	7.72%	\$1,586,239,713	-3.08%	98%	8.63%	94%	7.06%	99%
Morgan Stanley Inst Opportunity H	MEGHX	7.39%	\$244,919,024	-3.91%	99%	6.71%	98%	10.10%	98%
Morgan Stanley Inst Advantage H	MAPHX	6.71%	\$12,159,351	-1.57%	96%	11.96%	71%	21.88%	77%
Morgan Stanley Institutional Grow th I	MSEQX	6.63%	\$847,917,689	-2.33%	97%	11.34%	78%	12.88%	97%
Transamerica Capital Grow th A	IALAX	6.58%	\$746,167,025	-2.39%	98%	10.35%	85%	11.62%	97%
Morgan Stanley Multi Cap Grow th B	CPOBX	6.42%	\$313,515,817	-2.33%	97%	7.93%	96%	8.32%	99%
Morgan Stanley Inst Global Opportunity I	MGGIX	6.42%	\$15,221,935	-3.96%	98%	4.98%	93%	3.77%	93%
Morgan Stanley Inst Gbl Advantage I	MIGIX	5.19%	\$2,513,921	-0.36%	86%	13.94%	10%	19.13%	9%
Turner Concentrated Gr Investor	TTOPX	5.00%	\$35,255,772	-4.20%	99%	9.28%	92%	14.60%	96%
Morgan Stanley Inst Gbl Discovery I	MLDIX	4.79%	\$5,032,255	-1.53%	93%	11.60%	29%	15.92%	31%
Goldman Sachs Technology Tollkeeper A	GITAX	2.85%	\$358,167,660	-2.66%	92%	17.63%	26%	28.63%	29%
Turner Global Opportunities Instl	TGLBX	2.32%	\$1,420,185	-1.11%	91%	9.89%	52%	16.77%	23%
Chesapeake Core Grow th	CHCGX	2.23%	\$31,550,392	0.20%	66%	16.83%	12%	28.85%	19%
Chesapeake Grow th Instl	CHESX	2.15%	\$10,660,814	-1.39%	70%	15.84%	2%	23.82%	46%
Saratoga Large Capitalization Grow th I	SLCGX	1.73%	\$20,539,302	0.63%	46%	12.43%	65%	26.38%	40%
Lord Abbett Grow th Leaders A	LGLAX	1.67%	\$23,284,142	-0.78%	90%	10.58%	84%	22.02%	76%
Tocqueville Opportunity	TOPPX	1.61%	\$68,606,152	-2.15%	77%	12.18%	25%	25.75%	45%
Goldman Sachs Concentrated Grow th A	GCGAX	1.60%	\$176,037,973	1.77%	7%	17.33%	9%	28.74%	20%
American Independence Large Cap Grow th I	A FLX	1.59%	\$5,723,812	-3.24%	99%	1.67%	99%	10.15%	98%
Eagle Capital Appreciation A	HRCPX	1.58%	\$312,936,069	1.75%	8%	17.64%	7%	27.76%	26%
Loomis Sayles Grow th Y	LSGRX	1.58%	\$137,102,956	1.09%	27%	13.02%	59%	26.08%	42%
Sands Capital Global Grow th Inst	SCMGX	1.55%	\$26,411,222	-0.16%	84%	12.51%	18%	18.99%	10%
Firsthand Technology Opportunities	TEFQX	1.52%	\$83,809,180	2.91%	1%	17.78%	24%	15.43%	93%
Touchstone Sands Capital Select Grow th Z	PTSGX	1.51%	\$2,650,677,414	0.34%	61%	20.80%	3%	34.98%	2%
Touchstone Sands Capital Inst Gr	CISGX	1.50%	\$1,879,329,652	0.36%	60%	21.45%	2%	35.72%	2%
Turner Large Grow th Institutional	TTMEX	1.36%	\$254,252,990	-0.57%	86%	11.79%	73%	21.25%	80%
Columbia Global Extended Alpha A	RTAAX	1.36%	\$18,990,332	1.43%	34%	8.50%	73%	13.66%	59%
Invesco Leisure Investor	FLISX	1.25%	\$362,284,050	-2.50%	83%	18.34%	12%	29.20%	79%
Invesco Technology Sector B	FOBX	1.19%	\$103,441,217	-1.45%	81%	12.59%	67%	28.04%	34%
AllianceBern Global Thematic Gr A	ALTFX	1.17%	\$830,246,855	-3.98%	99%	5.56%	91%	-0.55%	95%
Invesco Technologov	FTCHX	1.17%	\$709,896,602	-1.29%	71%	12.27%	69%	25.97%	44%

Investor	Ticker	Assets	Facebook	Facebook %	Facebook %	Facebook %	Facebook %	Facebook %	Facebook %
Artisan Global Opportunities Inv	ARTRX	1.15%	\$238,682,629	2.30%	12%	22.11%	1%	26.59%	1%
Baron Global Advantage Institutional	BGAIX	1.11%	\$2,313,424	-1.64%	94%	N/A	N/A	N/A	N/A
FL Large-Cap Growth P	N/A	1.08%	\$125,638,896	-0.21%	80%	16.11%	19%	27.24%	31%
Invesco Van Kampen American Franchise A	VAFAX	1.04%	\$5,607,536,462	-0.25%	81%	12.63%	62%	19.20%	89%
Invesco Constellation A	CSTGX	1.04%	\$2,462,252,859	-0.22%	80%	11.61%	75%	17.55%	93%
Invesco Van Kampen Mid Cap Gr A	VGRAX	1.04%	\$1,891,989,133	-1.72%	78%	8.66%	75%	19.77%	74%
Invesco Dynamics Inv	FIDYX	1.02%	\$821,481,822	-1.76%	80%	9.18%	70%	21.21%	68%
T. Rowe Price Global Stock	PRGSX	1.00%	\$513,696,057	0.12%	78%	9.77%	54%	11.82%	68%
JHancock US Global Leaders Gr A	USGLX	0.99%	\$570,665,220	0.38%	59%	16.58%	14%	33.99%	3%
T. Rowe Price Media & Telecommunications	PRMTX	0.97%	\$2,176,042,473	1.34%	75%	20.59%	12%	28.47%	12%
Hodges Pure Contrarian Retl	HDPCX	0.95%	\$6,538,442	-0.27%	28%	19.01%	2%	20.88%	77%
T. Rowe Price Science & Tech	PRSCX	0.93%	\$2,691,539,999	-3.08%	96%	7.42%	93%	15.44%	92%
VALIC Company I Science & Technology	VCSTX	0.93%	\$239,494,861	-0.85%	51%	13.67%	58%	21.83%	64%
Hartford Growth Opportunities B	HGOBX	0.91%	\$1,878,737,839	0.00%	74%	20.86%	3%	25.27%	48%
Oppenheimer Main Street A	MSIGX	0.90%	\$5,199,383,488	2.20%	7%	14.49%	16%	30.19%	6%
Hartford Growth Opportunities HLS IA	HAGOX	0.89%	\$1,068,479,670	0.14%	69%	21.83%	2%	26.91%	35%
MassMutual Premier	MSSAX	0.87%	\$159,288,656	2.21%	7%	14.29%	18%	29.78%	7%

Still, the Morgan Stanley funds' large stakes raise questions about whether the firm's role as lead underwriter influenced decisions.

A large investment bank that simultaneously buys and sells shares in any company "is in this conflicted position," said Frank Partnoy, a law professor at the University of San Diego who worked for Morgan Stanley in the 1990s. "This time it didn't work out."

The funds span the \$1.6 billion Focus Growth fund to the \$2.5 million Institutional Global Advantage fund.

Morgan Stanley's funds don't appear to have violated Securities and Exchange Commission rules limiting investments in offerings underwritten by an affiliate. SEC rules allow bank-affiliated mutual funds to participate in offerings in which the bank's investment bankers are advising the company, as long as the fund managers don't buy more than 25% of the deal and they buy the shares from a different bank.

The concentration of Morgan Stanley's funds stands out when compared with funds operated by other large institutional holders of Facebook stock.

Morgan Stanley Focus Growth Portfolio had 5.7% of its assets in Facebook shares as of July 31, according to Morgan Stanley's website, while Morgan Stanley Institutional Opportunity Portfolio had 5.5% and Morgan Stanley Institutional Growth Portfolio had 4.8%. Others among the eight Morgan Stanley mutual funds range between 3.6% and 4.6%. Those proportions ranged between 5% and 7.8% on June 30, according to the most recent Morningstar data that included other fund families.

"It's surprising that so many Morgan Stanley affiliated funds out of the thousands of mutual funds show up as having

extremely big weights," said Jay Ritter, a professor of finance at the University Florida.

Morgan Stanley isn't the largest institutional holder of Facebook.

Larger holders by dollar value include Fidelity Investments, [T. Rowe Price Group](#) Inc. TROW -0.79% and Goldman Sachs Asset Management, a unit of underwriter [Goldman Sachs Group](#) Inc. GS -0.24% Goldman also owned Facebook shares before its IPO

Goldman's most concentrated mutual fund position in Facebook was the Technology Tollkeeper fund, with Facebook making up 2.85% of its portfolio as of the end of June.

No mutual funds operated by Fidelity or T. Rowe Price, two other large institutional holders, publicly reported holding more than 1% of their portfolios in Facebook through June.

Many of the Morgan Stanley funds are sold to institutions only, and require a \$5 million minimum investment.

Morgan Stanley Multicap Growth Fund—one fund open to retail investors, including Morgan Stanley Smith Barney brokers—had a stake in Facebook as early as November 2010, when Facebook shares were valued at about \$13. They closed Thursday at \$19.44, down 49% since the IPO.

In June, a commentary on Morgan Stanley's fund website noted that Facebook and other technology stocks were "the leading detractor in the portfolio this quarter," attributing the decline in Facebook shares "to post-IPO volatility."

Under SEC rules, mutual fund managers also are bound by fiduciary duties to look out for their investors' interests over their own.

Read More

- [Deal Journal: Who Else Has a Big Bet on Facebook?](#)
- [Nasdaq's Facebook Plan Under Fire](#)

There's no sign that fund managers at Morgan Stanley bought Facebook shares because of the firm's underwriting relationship with Facebook, or to help curry favor with Facebook executives who chose Morgan Stanley for a key underwriting assignment in the spring IPO.

Mr. Ritter cited "psychological factors" as a possible explanation for the large investments, driven by the fact that many of the funds owned a big chunk of Facebook shares before the company sold shares to the public.

"There's a tendency to fall in love with what you've got rather than stepping back," said Mr. Ritter. Many Morgan Stanley funds added to their pre-public stakes during the month of the IPO—a sign, he said, that "they were drinking the Kool-Aid and became true believers."

Morgan Stanley has streamlined its mutual fund business under Gregory Fleming, who runs both the firm's asset management and wealth management units. Morgan Stanley's asset management at the end of June managed \$311 billion and produced \$456 million in revenues.

Morgan Stanley funds with the strongest liking for Facebook are overseen by Dennis Lynch, the firm's head of growth investing. A Morgan Stanley spokesman declined to comment on behalf of Mr. Lynch.

Write to Aaron Lucchetti at aaron.lucchetti@wsj.com and Telis Demos at Telis.Demos@wsj.com

Source: [The Wall Street Journal Online](#)

Print

Mutual Funds and Taxes

Distributions from mutual funds occur for several different reasons and are subject to differing tax rates. Many mutual funds bundle most of their payouts into single, net distributions at the end of each year.

Whenever a mutual fund company passes earnings and other payouts to shareholders, it's known as a distribution. The major distribution for most funds comes at the end of each year, when net amounts are calculated—capital gains and other earnings minus the expenses of running the funds.

It's up to you to report mutual fund transactions on your tax return, as well as pay the appropriate taxes on each type of fund income.

Distributions and your taxes

If you hold shares in a taxable account, you are required to pay taxes on mutual fund distributions, whether the distributions are paid out in cash or reinvested in additional shares. The funds report distributions to shareholders on IRS Form 1099-DIV after the end of each calendar year.

For any time during the year you bought or sold shares in a mutual fund, you must report the transaction on your tax return and pay tax on any gains and dividends. Additionally, as an owner of the shares in the fund, you must report and potentially pay taxes on transactions conducted by the fund, that is, whenever the fund sells securities.

If you move between mutual funds at the same company, it may not feel like you received your money back and then reinvested it; however, the transactions are treated like any other sales and purchases, and so you must report them and pay taxes on any gains.

For federal tax purposes, ordinary income is generally taxed at higher rates than qualified dividends and long-term capital gains. The chart below illustrates how each type of mutual fund income is taxed.

Mutual funds in retirement and college savings accounts

Certain accounts, such as individual retirement and college savings accounts, are tax-advantaged. If you have mutual funds in these types of accounts, you pay taxes only when earnings or pre-tax contributions are withdrawn. This information will usually be reported on Form 1099-R.

Type of distribution	Definition	Federal income tax treatment
Long-term capital gains	Net gains from the sale of shares held for more than one year; may include some distributions received from investments held by the fund	Subject to the capital gains rates, usually lower than the ordinary income tax rates
Short-term capital gains	Net gains from the sale of shares held for one year or less	May be treated as ordinary dividends, thus taxable at ordinary income tax rates
Qualified dividends	Dividends from common stock of domestic corporations and qualifying foreign corporations	Normally taxed as long-term capital gains (subject to certain holding period and hedging restrictions)
Ordinary or non-qualified dividends	Investment income earned by the fund from interest and non-qualified dividends minus expenses; often used as a blanket term that includes all taxable income except long-term capital gains.	Taxable at ordinary income tax rates
Tax-exempt interest	Some or all interest on certain bonds, usually state or local municipal bonds, designated as tax-exempt	Not taxable for federal tax purposes; may be subject to state and/or local taxes, depending on your resident state and the type of bonds purchased
Taxable interest	Interest on fixed-income securities	Taxable at ordinary income tax rates
Federal interest	Interest on federal debt instruments	Taxable at ordinary federal income tax rates, but exempt from state income tax
Required distributions	Non-investment income required to be distributed by the fund (such as foreign currency gains that are taxed as ordinary income when distributed)	Taxed as ordinary income
Return of capital	A portion of your invested principal returned to you	Not taxable

When there is no distribution

If a mutual fund does not have any capital gains, dividends, or other payouts, no distribution may occur. There may also be a non-taxable distribution. Shareholders will not be required to pay taxes if the fund

“My funds are doing great—I must owe a lot in taxes.”

Fidelity Contrafund 12-31-2012

FCNTX

Fidelity Contrafund K 12-31-2012

FCNKX

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Summary of Facebook conflicts of interests.

Code of Conduct for United States Judges:

Yellow Highlight = Notorious Facebook collaborator

"Avoid even the appearance of impropriety."

No.	Conflict	Notorious Facebook collaborators in whom Fidelity Contrafund also holds shares and other rights	Shares	Value (000s)
1	Leader* patent theft	Accenture PLC Class A ^a	12,015,464	\$799,028
2	Leader patent theft	athenahealth, Inc. (a) ^b	1,371,392	100,729
3	Leader patent theft	Boston Scientific Corp. (a) ^c	956,300	5,480
4	FB Dark Pools	Charles Schwab ^d	997,500	14,324
5	Accel Partners	Dropbox, Inc. Series A (h) ^e	1,260,898	11,410
6	Accel Partners	Dropbox, Inc. (h) ^e	5,464,028	49,445
7	Microsoft	Expedia, Inc. (Microsoft) ^f	644,487	39,604
8	Patent Infringer	Facebook, Inc. Class A ^g	24,588,325	654,787
9	FB Dark Pools	Fidelity Cash Central Fund, 0.18% (b) ^h	1,072,093,617	1,072,094
10	FB Dark Pools	Fidelity National Information Services, Inc. ^h	4,527,299	157,595
11	FB Dark Pools	Fidelity Securities Lending Cash Central Fund, 0.18% (b)(c) ^h	218,692,235	218,692
12	FB Dark Pools	Goldman Sachs Group, Inc. ⁱ	347,800	44,365
13	Leader patent theft	IBM Corp. ^j	915,236	175,313
14	FB Dark Pools	JPMorgan Chase & Co. ^k	4,560,232	200,513
15	Leader patent theft	LinkedIn Corp. (a) ^l	2,244,889	257,758
16	FB Dark Pools	Morgan Stanley ^m	2,406,700	46,016
17	FB Dark Pools	State Street Corp. ⁿ	2,594,400	121,963
18	FB Dark Pools	T. Rowe Price Group, Inc. ^o	275,000	17,911
19	Leader patent theft	Tesla Motors, Inc. (a) ^p	1,968,741	66,681
20	Accel Partners	Wal-Mart Stores, Inc. ^q	13,839,600	944,276
21	FB Dark Pools	Workday, Inc. ^r	1,037,800	56,560
22	FB Dark Pools	Workday, Inc. (h) ^r	1,223,783	60,027
		TOTAL		\$5,103,105

* Leader Technologies, Inc., Columbus, Ohio, U.S. Patent No. 7,139,761.

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Common Stocks - 98.7%

	Shares	Value (000s)
CONSUMER DISCRETIONARY - 20.0%		
Automobiles - 0.2%		
Hyundai Motor Co.	397,072	\$ 82,388
Tesla Motors, Inc. (a)	1,968,741	66,681
		<u>149,069</u>
Internet & Catalog Retail - 2.8%		
Amazon.com, Inc. (a)	5,901,237	1,482,037
Expedia, Inc.	644,487	39,604
Liberty Media Corp.:		
Interactive Series A (a)	2,547,100	50,127
CVS Caremark Corp.	10,048,000	485,821
Fresh Market, Inc. (a)	1,452,437	69,848
Wal-Mart Stores, Inc.	13,839,600	944,276
Whole Foods Market, Inc.	661,350	<u>60,401</u>
Health Care Equipment & Supplies - 1.0%		
Baxter International, Inc.	2,948,000	196,514
Boston Scientific Corp. (a)	956,300	5,480
CareFusion Corp. (a)	621,900	17,774
FINANCIALS - continued		
Capital Markets - continued		
Charles Schwab Corp.	997,500	\$ 14,324
Goldman Sachs Group, Inc.	347,800	44,365
Morgan Stanley	2,406,700	46,016
State Street Corp.	2,594,400	121,963
T. Rowe Price Group, Inc.	275,000	17,911
		<u>261,849</u>
Diversified Financial Services - 0.5%		
Citigroup, Inc.	4,962,702	196,324
JPMorgan Chase & Co.	4,560,232	200,513
Kotak Mahindra Bank Ltd.	1,183,309	<u>14,141</u>
		<u>410,978</u>
Health Care Technology - 0.7%		
athenahealth, Inc. (a)	1,371,392	100,729
Cerner Corp. (a)	6,251,149	<u>485,339</u>

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Electronic Equipment & Components - 0.7%

Amphenol Corp. Class A (e) 9,418,529 609,379

Internet Software & Services - 8.3%

Akamai Technologies, Inc. (a)	876,731	35,867
Constant Contact, Inc. (a)(d)	1,038,840	14,762
Cornerstone OnDemand, Inc. (a)	1,906,002	56,284
Dropbox, Inc. (h)	5,464,028	49,445
eBay, Inc. (a)	16,805,428	857,413
Equinix, Inc. (a)	690,600	142,402
ExactTarget, Inc.	1,732,500	34,650
Facebook, Inc. Class A	24,588,325	654,787
Google, Inc. Class A (a)	6,291,877	4,463,269
LinkedIn Corp. (a)	2,244,889	257,758
MercadoLibre, Inc. (d)	479,359	37,663
Rackspace Hosting, Inc. (a)	916,400	68,061
Web.com Group, Inc. (a)	193,103	2,858
Yahoo!, Inc. (a)	17,717,200	<u>352,572</u>
		<u>7,027,791</u>

IT Services - 5.7%

Accenture PLC Class A	12,015,464	799,028
Alliance Data Systems Corp. (a)(e)	2,731,011	395,341
Cognizant Technology Solutions Corp. Class A (a)	479,600	35,514
Fidelity National Information Services, Inc.	4,527,299	157,595
Fiserv, Inc. (a)	3,073,955	242,935
FleetCor Technologies, Inc. (a)	812,251	43,577
Gartner, Inc. Class A (a)	362,200	16,668
IBM Corp.	915,236	175,313
MasterCard, Inc. Class A	2,603,058	1,278,830
Paychex, Inc.	253,100	7,882
Syntel, Inc.	28,841	1,546
Vantiv, Inc.	132,971	2,715
Visa, Inc. Class A	10,661,179	<u>1,616,022</u>

4,772,966

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Software - 3.0%

Splunk, Inc.	1,301,088	37,758
Symantec Corp. (a)	8,309,100	156,294
Trion World Network, Inc. warrants 8/10/17 (a)(h)	124,282	0*
Ultimate Software Group, Inc. (a)	614,846	58,048
VMware, Inc. Class A (a)	1,141,600	107,470
Workday, Inc.	1,037,800	56,560
Workday, Inc. (h)	1,223,783	60,027

INFORMATION TECHNOLOGY - 0.0%

Internet Software & Services - 0.0%

Dropbox, Inc. Series A (h)	1,260,898	11,410
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Other Affiliated Issuers

An affiliated company is a company in which the Fund has ownership of at least 5% of the voting securities. Fiscal year to date transactions with companies which are or were affiliates are as follows:

Affiliate

(Amounts in thousands)	Value, beginning of period	Purchases	Sales Proceeds	Dividend Income	Value, end of period
Alliance Data Systems Corp.	\$ 156,000	\$ 152,954	\$ -	\$ -	\$ 395,341
Allot Communications Ltd.	-	53,271	-	-	37,894
Amphenol Corp.					
Class A	506,556	70,663	159,917	4,031	609,379
athenahealth, Inc.	45,749	131,579	81,322	-	-
Avion Gold Corp.	59,448	-	3,525	-	-
B2Gold Corp.	83,805	15,738	-	-	112,214
B2Gold Corp. (144A)	17,807	-	-	-	20,937

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Relationship to Facebook (Conflict of Interest):

No.	Entity/Person	Description of the relationship to Facebook principals
a.	Accenture	<p>Appointed to replace CGI Federal as contractor responsible for HealthCare.gov. This appointment appears to be out of one Facebook cartel pocket (Michelle Obama (CGI Federal), Todd Y. Park, Robert Kocher, Ann H. Lamont) and into another cartel participant. The site continues to make intimate use of Facebook and Leader Technologies' social networking invention, including the false claims that the technology is "open source."</p> <p>"Accenture to Take Over Fixing HealthCare.gov Website" by Stephanie Armour, <i>The Wall Street Journal</i>, Jan. 12, 2014 http://online.wsj.com/news/articles/SB10001424052702303819704579316944287311118.</p>
b.	athenahealth Inc.	<p>Founded by Todd Y. Park, Barack Obama's current U.S. Chief Technology Officer, former chief technology officer at U.S. Health & Human Services, chief architect of HealthCare.gov. athenahealth [sic] makes claims that social networking technology is "open source" without justification.</p> <p>Robert Kocher MD, Pres. Obamacare architect and member of the National Economic Council led by Lawrence "Larry" Summers is a director of U.S. CTO Todd Y. Park's Castlight Health. Park's brother David Y. Park is chief operating officer of athenahealth. Ann H. Lamont, Meritech Management, a large Facebook investor, is also a Castlight Health director.</p> <p>Obama's Chief Tech Officer Todd Y. Park Mired in Conflicts of Interest - Park misled the House Oversight Committee about his knowledge and role in HealthCare.gov" by <i>Americans For Innovation</i>, Nov. 15, 2013 http://americans4innovation.blogspot.com/2013/11/obamas-chief-tech-</p>

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		officer-todd-y-park.html >.
c.	Boston Scientific	<p>Site of a Leader Technologies beta testing site in the fall of 2003 for its invention, now called "social networking," where companies owned by Accel Partners LLP elicited trade secrets information just a month before Mark Zuckerberg hacked into the Harvard House sites on Oct. 28, 2003. Several months later, Facebook was on the market, supported by Facebook's largest shareholder and director, Accel Partners, James W. Breyer, Managing Partner, along with Facebook director Reid Hoffman, also CEO of LinkedIn, and along with one of Facebook's largest shareholders and director, Peter Thiel.</p> <p><i>See Leader Technologies, Inc. v. Facebook, Inc.</i>, 08-cv-862-JJF-LPS (D.Del. 2008) Trial Transcripts; <i>See also Leader v. Facebook</i> FULL DOCKET Case 08-cv-862 JJF/LPS (D.Del. 2008) <http://www.scribd.com/doc/61256189/Leader-v-Facebook-FULL-DOCKET-Case-08-cv-862-JJF-LPS-D-Del-2008>.</p>
d.	Charles Schwab	<p>Given the number of funds (Fidelity, T.RowePrice, Blackrock, Goldman Sachs, Morgan Stanley, JPMorgan, etc.) in which Schwab invests co-terminously with various members of the Facebook cartel, a reasonable person will assume by inference that Schwab has inside knowledge of which funds would benefit disproportionately by the Facebook IPO et al.</p>
e.	Dropbox, Inc.	<p>This company is funded by Facebook's former director and largest shareholder James W. Breyer, Accel Partners LLP, and Goldman Sachs, among others.</p> <p>http://www.crunchbase.com/company/dropbox</p>
f.	Expedia	<p>Notoriously known to be owned by Microsoft, one of Facebook's largest shareholders. Microsoft is a "Leader" in the "Leaders Circle" at the Federal Circuit Bar Association. Microsoft was formerly represented by Thomas G. Hungar of Gibson Dunn LLP during the <i>Microsoft v. i4i</i> proceedings. Hungar also represented the Federal Circuit judges and the Federal Circuit Bar Association in a 2010 conflicts of interest matter, yet failed to disclose these conflicts of interest when the <i>Leader v. Facebook</i> matter came before the Federal Circuit.</p>

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Microsoft. The Federal Circuit Bar Association, "Leaders Circle" Webpage, Accessed Sep. 30, 2012 <<http://www.scribd.com/doc/108466240/The-Federal-Circuit-Bar-Association-Leaders-Circle-Webpage-Accessed-Sep-30-2012>>.

g. Facebook

On July 27, 2010, found guilty of infringing **Leader Technologies, Inc. U.S. Patent No. 7,139,761** on 11 of 11 claims. The verdict was split with a ruling of on-sale bar. However, Facebook presented no hard evidence and failed to perform any of the well-settled tests, e.g. *Pfaff Electronics* and *Group One v. Hallmark Cards*. The Federal Circuit affirmed the lower court after rejecting the lower court's arguments for on-sale bar and fabricating new evidence on argument for Facebook in the secrecy of chambers, without a hearing. Chief Justice **John G. Roberts** refused to take Leader Technologies' Petition for Writ of Certiorari.

Tellingly, the judges in this case hold this Fidelity Contrafund stock, namely Chief Justice John G. Roberts, Federal Circuit Judge **Kimberly A. Moore** and Federal Circuit Judge **Evan J. Wallach**.

It is notoriously known that during the pendency of the *Leader v. Facebook* trial, President Obama's political organization via **Obama for America** and **Organizing for America** exploited over 47 million "likes" on Facebook, an infringed technology, to raise money and influence voters in the 2008 and 2012 elections.

Petition for Writ of Certiorari *Leader Technologies, Inc., v. Facebook, Inc.* No. 12-617, Nov. 16, 2012 <<http://www.scribd.com/doc/113545399/Petition-for-Writ-of-Certiorari-Leader-Technologies-Inc-v-Facebook-Inc-No-12-617-U-S-Supreme-Court-Nov-16-212-clickable-citations>>.

Organizing for Action: Our Founding Members. ORGANIZING for ACTION. Apr. 12, 2013. Accessed by May 25, 2013 <<http://www.barackobama.com/founding-members>>.

Barack Obama. Facebook Fan Page. Accessed May 25, 2013 <<https://www.facebook.com/barackobama/>>; See also Apr. 16, 2013 capture online <<http://www.scribd.com/doc/144490626/Barack-Obama-Facebook>>.

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[Screen-Capture-Apr-16-2013-11-36am-AM-EDT](#)>.

Barack Obama Contributors, 2012 Federal Election Cycle, Cooley Godward Kronish LLP (Facebook attorneys; adviser to Barack Obama on the judicial appointments of Leonard P. Stark and Evan J. Wallach) donors through 12/31/2012 <<http://www.fec.gov/disclosurep/national.do>>.

h.	Fidelity	<p>Fund manager Robert C. Ketterson is a business and investing partner with Facebook's largest shareholder and former chairman, James W. Breyer, Accel Partners LLC. Breyer and Ketterson served for years as director of the National Venture Capital Association which also included Vanguard's Anne Rockhold (now CFO of Accel Partners LLP) and Ann H. Lamont, director of U.S. CTO Todd Y. Park's companies athenahealth and Castlight Health which are embroiled in current Obamacare and HealthCare.gov scandals. Lamont serves as a director of athenahealth and Castlight Health with Robert Kocher, Obamacare architect and member of the National Economic Council with Lawrence "Larry" Summers, former director of the Council where he oversaw the bailout of Facebook underwriters and large shareholders, Goldman Sachs and Morgan Stanley under the direction of JPMorgan Chase and Jamie Dimon.</p>
i.	Goldman Sachs	<p>Facebook's underwriter and large investor, notoriously known. Goldman also received a \$13+ billion 2008 stimulus grant which was overseen by Facebook collaborator Lawrence "Larry" Summers, who had just recently received hundreds of thousands in speaking stipends from Goldman earlier that year, among other perks. Goldman is also notoriously known to be a Moscow, Russia business partner with Russian oligarchs Alisher Usmanov and Yuri Milner. Yuri Milner is a World Bank protégé of Summers and was teamed with Facebook COO Sheryl K. Sandberg.</p> <p>Briefing for Representative Jim Jordan (OH) - HOUSE OVERSIGHT COMMITTEE - American and Russian Opportunists Undermining U.S. Sovereignty and Corrupting U.S. Financial and Judicial Systems, Oct. 19, 2012 <http://www.scribd.com/doc/110575673/Briefing-for-Representative-Jim-Jordan-OH-HOUSE-OVERSIGHT-COMMITTEE-American-and-Russian></p>

Fidelity Contrafund 12-31-2012

FCNTX

Fidelity Contrafund K 12-31-2012

FCNKX

FCNTX and/or FCNKX held by **Leader v. Facebook** judges &

Obama administration officials:

1. **John G. Roberts, Jr.**, Supreme Court
2. **Kimberly A. Moore**, Federal Circuit
3. **Evan J. Wallach**, Federal Circuit
4. **Howard K. Koh**, Health & Human Services
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6. **John J. Sullivan**, Federal Election Commission
7. **Carmel M. Martin**, Education
8. **Ivan K. Fong**, Homeland Security
9. **Alison J. Nathan**, White House
10. **Denis R. McDonough**, White House

Other Fidelity “dark pool” funds held by judges and Obama cabinet:

1. **Leonard P. Stark**, Dist. Ct. Del.
2. **Stephen G. Breyer**, Sup. Ct.
3. **Clarence Thomas**, Sup. Ct.
4. **Rebecca M. Blank**, Com. Sec., USPTO
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		Opportunists-Undermining-U-S-Sovereignty-and-Corruptin> .
j.	IBM	<p>IBM sold Facebook 750 patents during the pendency of <i>Leader v. Facebook</i>. The former Director of the U.S. Patent Office, David J. Kappos, systematically failed to disclose his bias toward Facebook’s and IBM’s interests regarding all matters related to Facebook’s intellectual property claims; neither has USPTO staff. Additionally, Facebook’s patent counsel in these IBM transactions is Fenwick & West LLP who has substantial conflicts of interest since the firm formerly represented Leader Technologies, Inc. in 2002-2003—the company whose social networking technology is being infringed by Facebook.</p> <p>Prior to leaving his post as Director of the Patent Office, David J. Kappos ordered an unprecedented third reexamination of <i>Leader Technologies’</i> U.S. Patent No. 7,139,761 using arguments identical to those that Facebook lost on at trial and in two previous reexaminations. Magically, the Examiner accepted ALL of Facebook’s arguments the fourth time around and is attempting to invalidate the entire patent, even claims that were not asserted at trial.</p> <p>In addition, former IBMer David J. Kappos established a Patent Office Facebook page for over 10,000 employees during the pendency of the <i>Leader v. Facebook</i> case.</p> <p>Petition for Writ of Certiorari <i>Leader Technologies, Inc., v. Facebook, Inc.</i> No. 12-617, Nov. 16, 2012 <http://www.scribd.com/doc/113545399/Petition-for-Writ-of-Certiorari-Leader-Technologies-Inc-v-Facebook-Inc-No-12-617-U-S-Supreme-Court-Nov-16-212-clickable-citations>; See also PATENT OFFICE REMOVES CRITICAL LEADER V. FACEBOOK DISCLOSURE ITEMS by Americans For Innovation, Aug. 15, 2013 <http://americans4innovation.blogspot.com/2013/08/uspto-conduct-parallels-foia.html>.</p> <p>“Patent Office Removes Critical <i>Leader v. Facebook</i> Disclosure Items” by <i>Americans For Innovation</i>, Aug. 15, 2013 <http://americans4innovation.blogspot.com/2013/08/uspto-conduct-parallels-foia.html>; See also Kathryn W. Siehndel, FOIA Deputy Counsel, U.S. Patent</p>

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		<p>Office FOIA Response re. <i>Leader v. Facebook</i>, F-13-00218, Aug. 7, 2013 <http://www.scribd.com/doc/160572991/Patent-Office-FOIA-Response-re-Leader-v-Facebook-F-13-00218-Aug-7-2013>; also available at <https://docs.google.com/file/d/0B2SfG2nEsMfqSWQ5SLJkbERjNOU/edit?usp=sharing> and <http://www.leader.com/docs/Patent-Office-FOIA-Response-re-Leader-v-Facebook-F-13-00218-Aug-7-2013.pdf>.</p> <p>U.S. PATENT OFFICE PRESS RELEASE ANNOUNCING ITS FACEBOOK PAGE, MAY 20, 2010: "US Patent Office Page on Facebook." USPTO Press Release, May 20, 2010 <http://www.scribd.com/doc/161914552/US-Patent-Office-Page-on-Facebook-USPTO-Press-Release-May-20-2010>; See also <https://docs.google.com/file/d/0B2SfG2nEsMfqa3A1YjR1OC1sM3c/edit?usp=sharing>.</p>
k.	JPMorgan Chase	<p>Notoriously known to be directing the investing activities of Morgan Stanley, T. Rowe Price, Goldman Sachs regarding all things Facebook via Chairman Jamie Dimon. Castlight Health and athenahealth Director Ann H. Lamont is married to Edward "Ned" Lamont, grandson of the founder of JPMorgan, Thomas W. Lamont. Castlight Health and athenahealth are embroiled in the Obamacare and HealthCare.gov scandal. U.S. CTO Todd Y. Park is founder of both athenahealth and Castlight Health. Park's brother, David Y. Park, is the current chief operating officer at athenahealth. Todd Y. Park has advised the Obama administration that they are clear to make the claim that HealthCare.gov technology is open source, despite the evident <i>Leader v. Facebook</i> frauds, among others. The Lamont's hold substantial amounts of Goldman Sachs, JPMorgan and Morgan Stanley holdings which benefited remarkably from Facebook transactions.</p> <p>Ann Huntress Lamont (a.k.a. Ann H. Lamont) and Edward M. ("Ned") investments in Facebook Club Funds, invested by 2006, prepared Nov. 26, 2013 <http://www.scribd.com/doc/187452662/Ann-Huntress-Lamont-a-k-a-Ann-H-Lamont-and-Edward-M-Ned-investments-in-Facebook-Club-Funds-invested-by-2006-prepared-Nov-26-2013>; See also <https://docs.google.com/file/d/0B2SfG2nEsMfqckwwdGg2Yy10NWs/edit>.</p>

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I.	LinkedIn Corp.	Facebook director Reid Hoffman is the founder and CEO of LinkedIn. It now notoriously known that Hoffman provided business coaching and early financing to Mark Zuckerberg while he was still a student at Harvard in 2003. LinkedIn software mimics Facebook’s functionality, perhaps this is no coincidence.
m.	Morgan Stanley	Facebook’s underwriter and large investor, notoriously known. Morgan Stanley also received a \$13+ billion 2008 stimulus grant which was overseen by Facebook collaborator Lawrence “Larry” Summers , who had just recently received hundreds of thousands in speaking stipends from Morgan Stanley compatriots at Goldman Sachs earlier that year, among other perks. Summers counts Facebook COO Sheryl K. Sandberg as his protégé and former employee at the World Bank and U.S. Treasury .
n.	State Street Corporation	Fellow recipient with Goldman Sachs and Morgan Stanley of approximately \$33 billion (collectively) in 2008 stimulus funds overseen by Facebook collaborator Lawrence “Larry” Summers , who had just recently received hundreds of thousands in speaking stipends from Goldman earlier that year, among other perks.
o.	T. Rowe Price	Purchased a 5.2% stake in Facebook’s private, pre-IPO “dark pools” stock, as notoriously disclosed in the Facebook S-1 Registration. Also heavily invested in U.S. CTO Todd Y. Park’s companies athenahealth and Castlight Health , two companies closely associated with Obamacare and the current administration.
p.	Tesla Motors, Inc.	Michael G. Rhodes, Cooley Godward LLP, Facebook’s litigator in <i>Leader Technologies, Inc. v. Facebook, Inc.</i> , cv-08-862-JJF-LPS (D. Del. 2008), was appointed Chief Counsel to Tesla Motors , five months before the trial. Tesla Motors received \$465 million in energy stimulus funds at the recommendation of McBee Strategic LLC and Michael Sheehy , former National Security Adviser for House Speaker Nancy Pelosi . Zusha Elinson. “Michael Rhodes (Cooley Godward LLP, Tesla Motors).” <i>The Recorder</i> , www.callaw.com, Feb. 22, 2010 < http://www.cooley.com/files/Rhodes.The%20Recorder.2.22.10.pdf >. See also< <a 479="" 516="" 947="" 963"="" data-label="Page-Footer" href="http://www.scribd.com/doc/144432049/Zusha-Elinson-%E2%80%9CMichael-</td> </tr> </table> </div> <div data-bbox="> <p>-11-</p>

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FCNTX

Fidelity Contrafund K 12-31-2012

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		<p>Rhodes-THE-RECORDER-Feb-22-2010-Accessed-May-29-2013>.</p> <p>Petition for Writ of Certiorari <i>Leader Technologies, Inc., v. Facebook, Inc.</i> No. 12-617, Nov. 16, 2012 <http://www.scribd.com/doc/113545399/Petition-for-Writ-of-Certiorari-Leader-Technologies-Inc-v-Facebook-Inc-No-12-617-U-S-Supreme-Court-Nov-16-212-clickable-citations></p>
q.	Wal-Mart	<p>Facebook's largest investor and director, James W. Breyer, Accel Partners LLP, was also a director at Wal-Mart and was responsible for a deep embedding of Facebook technology in the Wal-Mart site. Breyer resigned as a long time director of Wal-Mart after the Mexican bribery scandal was uncovered.</p> <p>"Vast Mexico Bribery Case Hushed Up by Wal-Mart After Top-Level Struggle - Confronted with evidence of widespread corruption in Mexico, top Wal-Mart executives focused more on damage control than on rooting out wrongdoing, an examination by The New York Times found" by David Barstow, <i>The New York Times</i>, Apr. 21, 2012 <http://www.nytimes.com/2012/04/22/business/at-wal-mart-in-mexico-a-bribe-inquiry-silenced.html?pagewanted=all& r=0>.</p>
r.	Workday Inc.	<p>This company is financed by principal Facebook investors and underwriters, including T. Rowe Price and Morgan Stanley.</p> <p>http://www.crunchbase.com/company/workday</p>

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Evidence Resources:

1. **Conflicts Analysis:** The most comprehensive archive of judicially recognizable source material and conflicts of interest analysis is accessible from the *Leader v. Facebook* investigative news reporting Google search tool at <http://americans4innovation.blogspot.com>.
2. **FCNTX Fidelity® Contrafund® Annual Report, December 31, 2012**, Posted March 01, 2013, Fidelity, accessed Jan. 17, 2014 <<https://fundresearch.fidelity.com/mutual-funds/view-all/316071109#composition>> (Select "Prospectus & Reports," then select "Annual Report" tab).
3. **FCNKX Fidelity Contrafund Class K Annual Report, December 31, 2012**, Posted March 01, 2013 <<https://www.actionsxchangerepository.fidelity.com/ShowDocument/ComplianceEnvelope.htm?fax=-18%2342%23-61%23-110%23114%2378%23117%2320%23-1%2396%2339%23-62%23-21%2386%23-100%2337%2316%2335%23-68%2391%23-66%2354%23103%23-16%2369%23-30%2358%23-20%2376%23-84%23-11%23-87%230%23-50%23-20%23-92%23-98%23-116%23-28%2358%23-87%23104%2321%23-22%2311%23113%2329%2375%23-58%23126%2369%2339%23-94%2329%2339%23-65%2339%23-45%23-127%23-71%23101%23-100%23-56%23-33%2371%23107%23-82%23-3%23-86%23-27%23-57%23-125%2349%23-121%23-72%23-85%23-43%23-13%23-120%2388%23-41%23-122%2320%2389%2392%239%2377%23101%2359%236%23106%2330%2335%2358%23-105%23-42%2357%2363%2334%233%23102%2339%23-57%23107%23>>; See also <<http://quote.morningstar.com/fund-filing/Annual-Report/2012/12/31/t.aspx?t=FCNKX&ft=N-CSR&d=5e15bb3e4140606d3b05b7aa21813c71>>
4. **FCNTX Fidelity Contrafund, FCNKX Fidelity Contrafund Class K, U.S. Securities & Exchange Commission, EDGAR**, accessed Jan. 17, 2014 <<http://www.sec.gov/Archives/edgar/data/24238/000079542212000136/0000795422-12-000136-index.htm> CIK [0000024238](http://www.sec.gov/Archives/edgar/data/24238/000079542212000136/0000795422-12-000136-index.htm) | Series [S000006037](http://www.sec.gov/Archives/edgar/data/24238/000079542212000136/0000795422-12-000136-index.htm) Fidelity Contrafund | Class/Contract [C000016601](http://www.sec.gov/Archives/edgar/data/24238/000079542212000136/0000795422-12-000136-index.htm) FCNTX | Class K Class/Contract [C000064233](http://www.sec.gov/Archives/edgar/data/24238/000079542212000136/0000795422-12-000136-index.htm) FCNKX.

Vanguard Total Bond Market Index

12-31-2012

VBTIX
VBMFX

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- **Kimberly A. Moore**, Federal Circuit
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84 Obama Cabinet Members & 7 Federal Judges involved with *Leader v. Facebook* hold one or more Vanguard Funds invested in Facebook pre-IPO dark pools.

Summary of Facebook conflicts of interests.
Code of Conduct for United States Judges:

“Avoid even the appearance of impropriety.”

No.	Conflict	Notorious Facebook collaborators in whom T. Rowe Price also holds shares and other rights.	Value (000s)
1	Leader* patent theft	Baidu Inc. (China) (a)	\$ 427,000
2	FB Dark Pools	Blackrock Inc. (b)	39,222,000
3	FB Dark Pools	Goldman Sachs Group Inc. (c)	553,046,000
4	FB Dark Pools	Goldman Sachs GS Mortgage Securities (c)	73,784,000
5	Leader* patent theft	IBM (d)	154,724,000
6	FB Dark Pools	JP Morgan Chase Commercial Mortgage Securities Corp. (e)	234,156,000
7	FB Dark Pools	JPMorgan / Bear Stearns Commercial Mortgage Securities (e)	208,017,000
8	FB Dark Pools	JPMorgan / Bear Stearns Cos. LLC (e)	102,164,000
9	FB Dark Pools	JPMorgan Chase & Co. (e)	536,916,000
10	Leader* patent theft	Microsoft Corp. (f)	82,600,000
11	FB Dark Pools	Morgan Stanley (g)	446,073,000
12	FB Dark Pools	Morgan Stanley Capital (g)	353,312,000
13	FB Dark Pools	State Street Corp. (h)	31,155,000
14	FB Dark Pools	UBS AG (i)	113,188,000
15	FB Dark Pools	UBS LB-UBS Commercial Mortgage Trust (i)	227,153,000
16	Leader* patent theft	Wal-Mart Stores Inc. (j)	287,886,000
17	Leader* patent theft	Xerox Corp. (k)	65,372,000
TOTAL			\$ 3,509,195,000

* Leader Technologies, Inc. U.S. Patent No. 7,139,761 for social networking.

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	Coupon	Maturity Date	Face Amount (\$000)	Market Value (\$000)
Asset-Backed/Commercial Mortgage-Backed Securities (2.4%)				
3 JPMorgan / Bear Stearns Commercial Mortgage Securities	5.663%	6/11/40	10,368	10,595
3 JPMorgan / Bear Stearns Commercial Mortgage Securities	5.613%	6/11/50	3,753	3,820
3 JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2002-TOP8	4.830%	8/15/38	899	899
3 JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2003-TOP10	4.740%	3/13/40	4,695	4,713
3 JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2003-TOP12	4.680%	8/13/39	12,775	13,026
3 JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2004-PWR6	4.825%	11/11/41	495	523
3 JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2004-PWR6	4.868%	11/11/41	2,300	2,420
3 JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2004-TOP14	5.200%	1/12/41	2,830	2,920
3 JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2005-PWR10	5.405%	12/11/40	4,239	4,808
3 JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2005-PWR8	4.750%	6/11/41	4,175	4,295
3 JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2005-TOP18	4.933%	2/13/42	2,500	2,735
3 JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2005-TOP20	5.149%	10/12/42	3,215	3,623
3 JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2006-PWR11	5.452%	3/11/39	24,500	27,949
3 JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2006-PWR12	5.712%	9/11/38	260	299
3 JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				

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2006-PWR12	5.751%	9/11/38	5,500	6,247
3 JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2006-PWR13	5.582%	9/11/41	1,625	1,842
3 JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2006-TOP22	5.573%	4/12/38	4,525	5,000
3 JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2006-TOP22	5.573%	4/12/38	21,037	23,774
3 JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2006-TOP24	5.568%	10/12/41	8,375	9,422
3 JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2007-PWR16	5.715%	6/11/40	6,275	7,066
JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2007-PWR17	5.694%	6/11/50	21,900	26,001
JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2007-PWR17	5.890%	6/11/50	6,853	7,718
JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2007-PWR18	5.700%	6/11/50	10,400	12,552
JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2007-TOP26	5.513%	1/12/45	6,280	6,858
JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
2007-TOP28	5.742%	9/11/42	15,900	18,912
JPMorgan / Bear Stearns Commercial Mortgage Securities Trust				
		SUB TOTAL		\$208,017,000
3 GS Mortgage Securities Corp. II	5.506%	4/10/38	5,514	5,694
3 GS Mortgage Securities Trust 2004-GG2	5.396%	8/10/38	14,850	15,622
3 GS Mortgage Securities Trust 2006-GG6	5.553%	4/10/38	13,650	15,437
3 GS Mortgage Securities Trust 2006-GG6	5.622%	4/10/38	4,750	5,235
3 GS Mortgage Securities Trust 2007-GG10	5.789%	8/10/45	1,105	1,265
3 GS Mortgage Securities Trust 2011-GC5	3.707%	8/10/44	3,220	3,600
3 GS Mortgage Securities Trust 2012-GC6	3.482%	1/10/45	12,500	13,309
3 GS Mortgage Securities Trust 2012-GCJ7	3.377%	5/10/45	7,475	8,039
3 GS Mortgage Securities Trust 2012-GCJ9	2.773%	11/10/45	5,530	5,583

Vanguard Total Bond Market Index

12-31-2012

VBTIX
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FLPSX, FLPKX and Fidelity funds held by **Leader v.**

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84 Obama Cabinet Members & 7 Federal Judges involved with *Leader v. Facebook* hold one or more Vanguard Funds invested in Facebook pre-IPO dark pools.

SUB TOTAL \$73,784,000

3 JP Morgan Chase Commercial Mortgage Securities Corp.	2.829%	10/15/45	6,675	6,820
3 JP Morgan Chase Commercial Mortgage Securities Corp.	2.840%	12/15/47	3,750	3,831
3 JP Morgan Chase Commercial Mortgage Securities Trust 2003-C1	4.985%	1/12/37	1,416	1,421
3 JP Morgan Chase Commercial Mortgage Securities Trust 2003-CIBC6	5.255%	7/12/37	1,276	1,291
3 JP Morgan Chase Commercial Mortgage Securities Trust 2003-CIBC7	4.879%	1/12/38	20,922	21,445
3 JP Morgan Chase Commercial Mortgage Securities Trust 2004-CIBC10	4.654%	1/12/37	2,621	2,629
3 JP Morgan Chase Commercial Mortgage Securities Trust 2004-CIBC10	4.899%	1/12/37	540	571
3 JP Morgan Chase Commercial Mortgage Securities Trust 2004-CIBC8	4.404%	1/12/39	11,465	11,795
3 JP Morgan Chase Commercial Mortgage Securities Trust 2004-CIBC9	5.584%	6/12/41	19,325	20,468
3 JP Morgan Chase Commercial Mortgage Securities Trust 2005-CIBC11	5.197%	8/12/37	301	307
3 JP Morgan Chase Commercial Mortgage Securities Trust 2005-CIBC11	5.363%	8/12/37	2,000	2,131
3 JP Morgan Chase Commercial Mortgage Securities Trust 2005-CIBC13	5.333%	1/12/43	1,750	1,822
3 JP Morgan Chase Commercial Mortgage Securities Trust 2005-LDP2	4.738%	7/15/42	940	1,023
3 JP Morgan Chase Commercial Mortgage Securities Trust 2005-LDP2	4.780%	7/15/42	2,375	2,627
3 JP Morgan Chase Commercial Mortgage Securities Trust 2005-LDP4	4.918%	10/15/42	420	461

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Trust 2005-LDP5	5.200%	12/15/44	275	312
3 JP Morgan Chase Commercial Mortgage Securities				
Trust 2005-LDP5	5.242%	12/15/44	4,250	4,722
3 JP Morgan Chase Commercial Mortgage Securities				
Trust 2005-LDP5	5.321%	12/15/44	1,375	1,463
3 JP Morgan Chase Commercial Mortgage Securities				
Trust 2006-CIBC14	5.452%	12/12/44	3,300	3,638
3 JP Morgan Chase Commercial Mortgage Securities				
Trust 2006-CIBC16	5.593%	5/12/45	7,121	7,929
3 JP Morgan Chase Commercial Mortgage Securities				
Trust 2006-LDP6	5.475%	4/15/43	3,657	4,164
3 JP Morgan Chase Commercial Mortgage Securities				
Trust 2006-LDP7	5.871%	4/15/45	17,525	20,170
3 JP Morgan Chase Commercial Mortgage Securities				
Trust 2006-LDP7	5.871%	4/15/45	3,300	3,772
3 JP Morgan Chase Commercial Mortgage Securities				
Trust 2006-LDP7	5.871%	4/15/45	3,310	3,211
3 JP Morgan Chase Commercial Mortgage Securities				
Trust 2006-LDP8	5.440%	5/15/45	4,525	5,141
3 JP Morgan Chase Commercial Mortgage Securities				
Trust 2006-LDP8	5.447%	5/15/45	8,000	8,297
3 JP Morgan Chase Commercial Mortgage Securities				
Trust 2007-CIBC18	5.440%	6/12/47	10,650	12,230
3 JP Morgan Chase Commercial Mortgage Securities				
Trust 2007-CIBC20	5.794%	2/12/51	28,300	33,650
3 JP Morgan Chase Commercial Mortgage Securities				
Trust 2007-CIBC20	5.880%	2/12/51	3,350	3,872
3 JP Morgan Chase Commercial Mortgage Securities				
Trust 2007-LDP11	5.812%	6/15/49	7,970	9,380
3 JP Morgan Chase Commercial Mortgage Securities				
Trust 2007-LDP12	5.882%	2/15/51	13,170	15,473
3 JP Morgan Chase Commercial Mortgage Securities				
Trust 2012-C6	3.507%	5/15/45	9,250	10,046
3 JP Morgan Chase Commercial Mortgage Securities				
Trust 2012-CIBX	3.483%	6/15/45	7,490	8,044

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SUB TOTAL \$234,156,000

3 LB Commercial Mortgage Trust 2007-C3	5.886%	7/15/44	660	779
3 LB-UBS Commercial Mortgage Trust	5.347%	11/15/38	968	1,111
3 LB-UBS Commercial Mortgage Trust	6.157%	4/15/41	22,025	26,806
3 LB-UBS Commercial Mortgage Trust 2003-C3	4.166%	5/15/32	14,566	14,642
3 LB-UBS Commercial Mortgage Trust 2003-C7	4.931%	9/15/35	21,100	21,383
3 LB-UBS Commercial Mortgage Trust 2003-C8	5.124%	11/15/32	9,550	9,747
3 LB-UBS Commercial Mortgage Trust 2004-C7	4.786%	10/15/29	17,575	18,432
3 LB-UBS Commercial Mortgage Trust 2005-C1	4.742%	2/15/30	9,140	9,746
3 LB-UBS Commercial Mortgage Trust 2005-C2	5.150%	4/15/30	4,395	4,807
3 LB-UBS Commercial Mortgage Trust 2005-C5	5.057%	9/15/40	1,625	1,698
3 LB-UBS Commercial Mortgage Trust 2005-C7	5.197%	11/15/30	17,600	19,729
3 LB-UBS Commercial Mortgage Trust 2006-C1	5.217%	2/15/31	2,535	2,831
3 LB-UBS Commercial Mortgage Trust 2006-C3	5.661%	3/15/39	29,730	34,026
3 LB-UBS Commercial Mortgage Trust 2006-C4	5.865%	6/15/38	6,500	7,554
3 LB-UBS Commercial Mortgage Trust 2006-C6	5.372%	9/15/39	3,000	3,460
3 LB-UBS Commercial Mortgage Trust 2006-C6	5.413%	9/15/39	1,175	1,325
3 LB-UBS Commercial Mortgage Trust 2006-C7	5.378%	11/15/38	3,125	3,413
3 LB-UBS Commercial Mortgage Trust 2007-C1	5.424%	2/15/40	5,650	6,629
3 LB-UBS Commercial Mortgage Trust 2007-C2	5.430%	2/15/40	12,585	14,430
3 LB-UBS Commercial Mortgage Trust 2007-C7	5.866%	9/15/45	17,600	21,131
3 LB-UBS Commercial Mortgage Trust 2008-C1	6.157%	4/15/41	3,020	3,474

SUB TOTAL \$227,153,000

3 Morgan Stanley Bank of America Merrill Lynch Trust	3.176%	8/15/45	3,025	3,199
3 Morgan Stanley Bank of America Merrill Lynch Trust	2.858%	11/15/45	3,000	3,097
3 Morgan Stanley Capital I Trust 2003-IQ6	4.970%	12/15/41	9,585	9,827
3 Morgan Stanley Capital I Trust 2004-HQ3	4.800%	1/13/41	823	847
3 Morgan Stanley Capital I Trust 2004-HQ4	4.970%	4/14/40	5,675	5,921
3 Morgan Stanley Capital I Trust 2004-IQ8	5.110%	6/15/40	14,679	15,369
3 Morgan Stanley Capital I Trust 2004-TOP13	4.660%	9/13/45	3,985	4,080
3 Morgan Stanley Capital I Trust 2004-TOP15	5.030%	6/13/41	1,504	1,522
3 Morgan Stanley Capital I Trust 2004-TOP15	5.270%	6/13/41	4,525	4,711
3 Morgan Stanley Capital I Trust 2005-HQ5	5.168%	1/14/42	3,950	4,264
3 Morgan Stanley Capital I Trust 2005-HQ6	4.989%	8/13/42	26,760	29,784
3 Morgan Stanley Capital I Trust 2005-HQ6	5.073%	8/13/42	3,730	3,863
3 Morgan Stanley Capital I Trust 2005-HQ7	5.208%	11/14/42	14,450	16,045
3 Morgan Stanley Capital I Trust 2005-IQ10	5.230%	9/15/42	23,225	25,558
3 Morgan Stanley Capital I Trust 2005-IQ9	4.770%	7/15/56	3,295	3,405
3 Morgan Stanley Capital I Trust 2005-TOP17	4.780%	12/13/41	11,300	12,146
3 Morgan Stanley Capital I Trust 2005-TOP17	4.840%	12/13/41	1,350	1,402
3 Morgan Stanley Capital I Trust 2005-TOP19	4.985%	6/12/47	3,115	3,293
3 Morgan Stanley Capital I Trust 2006-HQ10	5.328%	11/12/41	6,460	7,452

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3 Morgan Stanley Capital I Trust 2006-HQ10	5.360%	11/12/41	7,400	8,233
3 Morgan Stanley Capital I Trust 2006-HQ8	5.420%	3/12/44	20,466	23,230
3 Morgan Stanley Capital I Trust 2006-HQ8	5.469%	3/12/44	4,875	5,452
3 Morgan Stanley Capital I Trust 2006-HQ9	5.773%	7/12/44	4,596	5,166
3 Morgan Stanley Capital I Trust 2006-HQ9	5.793%	7/12/44	4,100	4,467
3 Morgan Stanley Capital I Trust 2006-IQ11	5.691%	10/15/42	8,175	9,356
3 Morgan Stanley Capital I Trust 2006-IQ11	5.695%	10/15/42	700	797
3 Morgan Stanley Capital I Trust 2006-IQ11	5.695%	10/15/42	4,325	4,641
3 Morgan Stanley Capital I Trust 2006-IQ12	5.332%	12/15/43	11,450	13,185
3 Morgan Stanley Capital I Trust 2006-TOP21	5.090%	10/12/52	149	149
3 Morgan Stanley Capital I Trust 2006-TOP21	5.204%	10/12/52	6,200	6,821
3 Morgan Stanley Capital I Trust 2006-TOP23	5.749%	8/12/41	100	101
3 Morgan Stanley Capital I Trust 2006-TOP23	5.818%	8/12/41	2,175	2,531
3 Morgan Stanley Capital I Trust 2007-IQ14	5.654%	4/15/49	1,665	1,793
3 Morgan Stanley Capital I Trust 2007-IQ14	5.692%	4/15/49	14,295	16,689
3 Morgan Stanley Capital I Trust 2007-IQ16	5.809%	12/12/49	12,950	15,327
3 Morgan Stanley Capital I Trust 2007-IQ16	6.103%	12/12/49	4,675	5,458
3 Morgan Stanley Capital I Trust 2007-TOP25	5.514%	11/12/49	1,295	1,500
3 Morgan Stanley Capital I Trust 2007-TOP25	5.544%	11/12/49	4,525	4,931
3 Morgan Stanley Capital I Trust 2007-TOP27	5.651%	6/11/42	20,780	24,564
3 Morgan Stanley Capital I Trust 2007-TOP27	5.651%	6/11/42	5,075	5,719
3 Morgan Stanley Capital I Trust 2008-TOP29	6.275%	1/11/43	24,385	29,997
3 Morgan Stanley Capital I Trust 2012-C4	3.244%	3/15/45	7,000	7,333
3 Morgan Stanley Dean Witter Capital I Trust 2001-TOP3	6.390%	7/15/33	87	87

SUB TOTAL \$353,312,000

JPMorgan / Bear Stearns Cos. LLC	5.700%	11/15/14	15,590	16,918
JPMorgan / Bear Stearns Cos. LLC	5.300%	10/30/15	6,415	7,126
JPMorgan / Bear Stearns Cos. LLC	5.550%	1/22/17	21,150	23,843
JPMorgan / Bear Stearns Cos. LLC	6.400%	10/2/17	17,730	21,321
JPMorgan / Bear Stearns Cos. LLC	7.250%	2/1/18	24,788	31,089
JPMorgan / Bear Stearns Cos. LLC	4.650%	7/2/18	1,650	1,867

SUB TOTAL \$102,164,000

Goldman Sachs Capital I	6.345%	2/15/34	16,825	17,603
Goldman Sachs Group Inc.	5.150%	1/15/14	17,395	18,120
Goldman Sachs Group Inc.	6.000%	5/1/14	19,725	20,979
Goldman Sachs Group Inc.	5.000%	10/1/14	36,012	38,382
Goldman Sachs Group Inc.	5.125%	1/15/15	17,910	19,242
Goldman Sachs Group Inc.	3.700%	8/1/15	17,100	17,995
Goldman Sachs Group Inc.	5.350%	1/15/16	23,500	25,933
Goldman Sachs Group Inc.	3.625%	2/7/16	26,165	27,689
Goldman Sachs Group Inc.	5.750%	10/1/16	5,725	6,492

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Goldman Sachs Group Inc.	5.625%	1/15/17	19,930	21,836
Goldman Sachs Group Inc.	6.250%	9/1/17	27,565	32,318
Goldman Sachs Group Inc.	5.950%	1/18/18	37,425	43,690
Goldman Sachs Group Inc.	6.150%	4/1/18	13,460	15,835
Goldman Sachs Group Inc.	7.500%	2/15/19	5,990	7,520
Goldman Sachs Group Inc.	5.375%	3/15/20	32,175	36,796
Goldman Sachs Group Inc.	6.000%	6/15/20	17,220	20,417
Goldman Sachs Group Inc.	5.250%	7/27/21	6,500	7,402
Goldman Sachs Group Inc.	5.750%	1/24/22	32,800	38,540
Goldman Sachs Group Inc.	5.950%	1/15/27	22,685	24,576
Goldman Sachs Group Inc.	6.125%	2/15/33	18,851	21,934
Goldman Sachs Group Inc.	6.450%	5/1/36	5,535	6,034
Goldman Sachs Group Inc.	6.750%	10/1/37	56,741	64,151
Goldman Sachs Group Inc.	6.250%	2/1/41	16,151	19,562

SUB TOTAL \$553,046,000

JPMorgan Chase & Co.	2.050%	1/24/14	6,195	6,288
JPMorgan Chase & Co.	4.875%	3/15/14	18,100	18,888
JPMorgan Chase & Co.	4.650%	6/1/14	40,991	43,149
JPMorgan Chase & Co.	5.125%	9/15/14	22,423	23,826
JPMorgan Chase & Co.	3.700%	1/20/15	19,375	20,392
JPMorgan Chase & Co.	4.750%	3/1/15	18,150	19,560
JPMorgan Chase & Co.	1.875%	3/20/15	3,525	3,585
JPMorgan Chase & Co.	5.250%	5/1/15	5,575	6,049
JPMorgan Chase & Co.	3.400%	6/24/15	31,975	33,678
JPMorgan Chase & Co.	5.150%	10/1/15	5,190	5,705
JPMorgan Chase & Co.	1.100%	10/15/15	17,150	17,128
JPMorgan Chase & Co.	2.600%	1/15/16	15,375	15,957
JPMorgan Chase & Co.	3.450%	3/1/16	3,425	3,644
JPMorgan Chase & Co.	3.150%	7/5/16	42,950	45,416
JPMorgan Chase & Co.	6.125%	6/27/17	19,875	23,137
JPMorgan Chase & Co.	2.000%	8/15/17	22,500	22,926
JPMorgan Chase & Co.	6.000%	1/15/18	19,610	23,478
JPMorgan Chase & Co.	6.300%	4/23/19	21,025	25,877
JPMorgan Chase & Co.	4.400%	7/22/20	3,275	3,693
JPMorgan Chase & Co.	4.250%	10/15/20	2,640	2,923
JPMorgan Chase & Co.	4.625%	5/10/21	475	540
JPMorgan Chase & Co.	4.350%	8/15/21	7,575	8,462
JPMorgan Chase & Co.	4.500%	1/24/22	3,000	3,400
JPMorgan Chase & Co.	3.250%	9/23/22	6,350	6,532
JPMorgan Chase & Co.	6.400%	5/15/38	59,269	79,234
JPMorgan Chase & Co.	5.500%	10/15/40	32,200	39,248
JPMorgan Chase & Co.	5.600%	7/15/41	11,100	13,792
JPMorgan Chase & Co.	5.400%	1/6/42	7,550	9,071
JPMorgan Chase Bank NA	5.875%	6/13/16	4,346	4,923
JPMorgan Chase Bank NA	6.000%	7/5/17	825	967
JPMorgan Chase Bank NA	6.000%	10/1/17	4,615	5,448

SUB TOTAL \$536,916,000

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Morgan Stanley	2.875%	1/24/14	11,925	12,126
Morgan Stanley	4.750%	4/1/14	26,117	27,009
Morgan Stanley	6.000%	5/13/14	21,485	22,744
Morgan Stanley	2.875%	7/28/14	3,825	3,913
Morgan Stanley	4.200%	11/20/14	15,675	16,366
Morgan Stanley	4.100%	1/26/15	13,425	13,995
Morgan Stanley	6.000%	4/28/15	24,360	26,464
Morgan Stanley	4.000%	7/24/15	3,750	3,924
Morgan Stanley	5.375%	10/15/15	6,400	6,951
Morgan Stanley	3.450%	11/2/15	9,325	9,714
Morgan Stanley	3.800%	4/29/16	875	917
Morgan Stanley	5.750%	10/18/16	17,175	19,047
Morgan Stanley	5.450%	1/9/17	14,785	16,362
Morgan Stanley	4.750%	3/22/17	19,048	20,726
Morgan Stanley	5.550%	4/27/17	10,000	11,074
Morgan Stanley	6.250%	8/28/17	2,010	2,310
Morgan Stanley	5.950%	12/28/17	17,475	19,756
Morgan Stanley	6.625%	4/1/18	35,085	41,241
Morgan Stanley	7.300%	5/13/19	12,510	15,151
Morgan Stanley	5.625%	9/23/19	47,150	53,131
Morgan Stanley	5.500%	7/24/20	745	836
Morgan Stanley	5.750%	1/25/21	14,375	16,241
Morgan Stanley	5.500%	7/28/21	10,600	11,965
Morgan Stanley	4.875%	11/1/22	14,850	15,287
Morgan Stanley	6.250%	8/9/26	15,625	18,209
Morgan Stanley	7.250%	4/1/32	17,527	21,879
Morgan Stanley	6.375%	7/24/42	16,025	18,735

SUB TOTAL \$446,073,000

State Street Bank & Trust Co.	5.300%	1/15/16	2,800	3,122
State Street Corp.	4.300%	5/30/14	2,645	2,786
State Street Corp.	2.875%	3/7/16	19,100	20,400
State Street Corp.	4.956%	3/15/18	3,875	4,386
State Street Corp.	4.375%	3/7/21	400	461

SUB TOTAL \$31,155,000

UBS AG	2.250%	1/28/14	150	152
UBS AG	3.875%	1/15/15	1,490	1,571
UBS AG	7.000%	10/15/15	2,500	2,796
UBS AG	5.875%	7/15/16	6,025	6,746
UBS AG	7.375%	6/15/17	12,924	14,991
UBS AG	5.875%	12/20/17	34,924	41,425
UBS AG	5.750%	4/25/18	11,042	13,067
UBS AG	4.875%	8/4/20	28,035	32,440

SUB TOTAL \$113,188,000

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BlackRock Inc.	3.500%	12/10/14	4,275	4,515
BlackRock Inc.	1.375%	6/1/15	2,100	2,130
BlackRock Inc.	6.250%	9/15/17	3,375	4,126
BlackRock Inc.	5.000%	12/10/19	8,098	9,658
BlackRock Inc.	4.250%	5/24/21	6,515	7,336
BlackRock Inc.	3.375%	6/1/22	10,800	11,457

SUB TOTAL \$39,222,000

Wal-Mart Stores Inc.	1.625%	4/15/14	1,175	1,195
Wal-Mart Stores Inc.	3.200%	5/15/14	20,700	21,513
Wal-Mart Stores Inc.	4.500%	7/1/15	2,450	2,686
Wal-Mart Stores Inc.	2.250%	7/8/15	3,850	4,023
Wal-Mart Stores Inc.	1.500%	10/25/15	21,960	22,600
Wal-Mart Stores Inc.	2.800%	4/15/16	300	320
Wal-Mart Stores Inc.	5.375%	4/5/17	1,650	1,953
Wal-Mart Stores Inc.	5.800%	2/15/18	13,400	16,402
Wal-Mart Stores Inc.	3.625%	7/8/20	38,550	42,923
Wal-Mart Stores Inc.	3.250%	10/25/20	26,525	28,807
Wal-Mart Stores Inc.	4.250%	4/15/21	14,600	17,057
Wal-Mart Stores Inc.	5.875%	4/5/27	18,775	25,305
Wal-Mart Stores Inc.	7.550%	2/15/30	13,345	19,679
Wal-Mart Stores Inc.	5.250%	9/1/35	6,675	8,110
Wal-Mart Stores Inc.	6.500%	8/15/37	21,186	29,755
Wal-Mart Stores Inc.	6.200%	4/15/38	5,781	7,834
Wal-Mart Stores Inc.	5.625%	4/1/40	4,250	5,471
Wal-Mart Stores Inc.	4.875%	7/8/40	1,950	2,297
Wal-Mart Stores Inc.	5.000%	10/25/40	1,305	1,567
Wal-Mart Stores Inc.	5.625%	4/15/41	21,950	28,389

SUB TOTAL \$287,886,000

Baidu Inc. (China)	3.500%	11/28/22	425	427
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SUB TOTAL \$427,000

International Business Machines Corp.	6.500%	10/15/13	2,796	2,927
International Business Machines Corp.	1.250%	5/12/14	300	304
International Business Machines Corp.	0.875%	10/31/14	200	202
International Business Machines Corp.	0.550%	2/6/15	8,000	7,991
International Business Machines Corp.	2.000%	1/5/16	2,525	2,616
International Business Machines Corp.	1.950%	7/22/16	36,575	37,963
International Business Machines Corp.	1.250%	2/6/17	6,300	6,368
International Business Machines Corp.	5.700%	9/14/17	37,151	44,812
International Business Machines Corp.	7.625%	10/15/18	6,475	8,654
International Business Machines Corp.	1.875%	5/15/19	1,025	1,039
International Business Machines Corp.	1.875%	8/1/22	3,700	3,559
International Business Machines Corp.	7.000%	10/30/25	965	1,391
International Business Machines Corp.	6.220%	8/1/27	9,850	13,346
International Business Machines Corp.	6.500%	1/15/28	600	815

Vanguard Total Bond Market Index

12-31-2012

VBTIX

VBMFX

FLPSX, FLPKX and Fidelity funds held by **Leader v.**

Facebook judges & Obama administration officials:

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- **Elena Kagan**, Assoc. Justice, Supreme Court
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84 Obama Cabinet Members & 7 Federal Judges involved with *Leader v. Facebook* hold one or more Vanguard Funds invested in Facebook pre-IPO dark pools.

International Business Machines Corp.	5.875%	11/29/32	875	1,162
International Business Machines Corp.	5.600%	11/30/39	8,989	11,534
International Business Machines Corp.	4.000%	6/20/42	9,502	10,041
			SUB TOTAL \$154,724,000	

Microsoft Corp.	2.950%	6/1/14	7,900	8,193
Microsoft Corp.	1.625%	9/25/15	20,545	21,184
Microsoft Corp.	4.200%	6/1/19	7,425	8,552
Microsoft Corp.	3.000%	10/1/20	13,020	14,055
Microsoft Corp.	2.125%	11/15/22	2,000	1,976
Microsoft Corp.	5.200%	6/1/39	4,825	5,905
Microsoft Corp.	4.500%	10/1/40	5,543	6,181
Microsoft Corp.	5.300%	2/8/41	5,190	6,493
Microsoft Corp.	3.500%	11/15/42	10,480	10,061
			SUB TOTAL \$82,600,000	

Xerox Corp.	8.250%	5/15/14	7,523	8,195
Xerox Corp.	4.250%	2/15/15	19,875	20,898
Xerox Corp.	6.400%	3/15/16	8,045	9,082
Xerox Corp.	6.750%	2/1/17	3,050	3,550
Xerox Corp.	2.950%	3/15/17	650	665
Xerox Corp.	6.350%	5/15/18	11,850	13,713
Xerox Corp.	5.625%	12/15/19	7,575	8,461
Xerox Corp.	6.750%	12/15/39	675	808
			SUB TOTAL \$65,372,000	

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Relationship to Facebook (Conflict of Interest):

a.	Baidu Inc. (China)	<p>Facebook is a business partner.</p> <p>ZUCKERBERG'S TAKING FACEBOOK INTO CHINA, BUT IT'LL BE A BAIDU BEAST by Kit Eaton, Fast Company, Apr. 11, 2011 http://www.fastcompany.com/1746392/zuckerbergs-taking-facebook-china-itll-be-baidu-beast.</p>
b.	Blackrock	<p>Now notoriously known to be a Facebook pre-IPO dark pools underwriter who forced Facebook staff to sell their shares in order to create the dark pool marketplace, according to Mark Zuckerberg's former speech writer, Katherine Losse.</p> <p>http://www.scribd.com/doc/114662183/Morally-Bankrupt-American-and-Russian-Adults-and-Their-Hacker-Boy-Kings-Construct-a-Nouveau-Totalitarianism-Full-Of-Dark-Profiles-Group-think</p>
c.	Goldman Sachs	<p>Facebook's underwriter and large investor, notoriously known. Goldman also received a \$13+ billion 2008 stimulus grant which was overseen by Facebook collaborator Lawrence "Larry" Summers, who had just recently received hundreds of thousands in speaking stipends from Goldman earlier that year, among other perks. Goldman is also notoriously known to be a Moscow, Russia business partner with Russian oligarchs Alisher Usmanov and Yuri Milner. Yuri Milner is a World Bank protégé of Summers and was teamed with Facebook COO Sheryl K. Sandberg.</p> <p>Briefing for Representative Jim Jordan (OH) - HOUSE OVERSIGHT COMMITTEE - American and Russian Opportunists Undermining U.S. Sovereignty and Corrupting U.S. Financial and Judicial Systems, Oct. 19, 2012 http://www.scribd.com/doc/110575673/Briefing-for-Representative-Jim-Jordan-OH-HOUSE-OVERSIGHT-COMMITTEE-American-and-Russian-Opportunists-Undermining-U-S-Sovereignty-and-Corruptin</p>
d.	IBM	<p>IBM sold Facebook 750 patents during the pendency of <i>Leader v. Facebook</i>.</p>

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	<p>The former Director of the U.S. Patent Office, David J. Kappos, systematically failed to disclose his bias toward Facebook’s and IBM’s interests regarding all matters related to Facebook’s intellectual property claims; neither has USPTO staff. Additionally, Facebook’s patent counsel in these IBM transactions is Fenwick & West LLP who has substantial conflicts of interest since the firm formerly represented Leader Technologies, Inc. in 2002-2003—the company whose social networking technology is being infringed by Facebook.</p> <p>Prior to leaving his post as Director of the Patent Office, David J. Kappos ordered an unprecedented third reexamination of Leader Technologies’ U.S. Patent No. 7,139,761 using arguments identical to those that Facebook lost on at trial and in two previous reexaminations. Magically, the Examiner accepted ALL of Facebook’s arguments the fourth time around and is attempting to invalidate the entire patent, even claims that were not asserted at trial.</p> <p>In addition, former IBMer David J. Kappos established a Patent Office Facebook page for over 10,000 employees during the pendency of the <i>Leader v. Facebook</i> case.</p> <p>Petition for Writ of Certiorari <i>Leader Technologies, Inc., v. Facebook, Inc.</i> No. 12-617, Nov. 16, 2012 <http://www.scribd.com/doc/113545399/Petition-for-Writ-of-Certiorari-Leader-Technologies-Inc-v-Facebook-Inc-No-12-617-U-S-Supreme-Court-Nov-16-2012-clickable-citations>; See also PATENT OFFICE REMOVES CRITICAL LEADER V. FACEBOOK DISCLOSURE ITEMS by Americans For Innovation, Aug. 15, 2013 <http://americans4innovation.blogspot.com/2013/08/uspto-conduct-parallels-foia.html>.</p> <p>“Patent Office Removes Critical <i>Leader v. Facebook</i> Disclosure Items” by <i>Americans For Innovation</i>, Aug. 15, 2013 <http://americans4innovation.blogspot.com/2013/08/uspto-conduct-parallels-foia.html>; See also Kathryn W. Siehndel, FOIA Deputy Counsel, U.S. Patent Office FOIA Response re. <i>Leader v. Facebook</i>, F-13-00218, Aug. 7, 2013 <http://www.scribd.com/doc/160572991/Patent-Office-FOIA-Response-re-Leader-v-Facebook-F-13-00218-Aug-7-2013>; also available at <https://docs.google.com/file/d/0B2SfG2nEsmfqSWQ5SlJkbERjNOU/edit?usp=sharing> and <http://www.leader.com/docs/Patent-Office-FOIA-Response-re></p>
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84 Obama Cabinet Members & 7 Federal Judges involved with *Leader v. Facebook* hold one or more Vanguard Funds invested in Facebook pre-IPO dark pools.

		<p>Leader-v-Facebook-F-13-00218-Aug-7-2013.pdf>.</p> <p>U.S. PATENT OFFICE PRESS RELEASE ANNOUNCING ITS FACEBOOK PAGE, MAY 20, 2010: "US Patent Office Page on Facebook." USPTO Press Release, May 20, 2010 <http://www.scribd.com/doc/161914552/US-Patent-Office-Page-on-Facebook-USPTO-Press-Release-May-20-2010>; See also <https://docs.google.com/file/d/0B2SfG2nEsMfga3A1YjR1OC1sM3c/edit?usp=sharing>.</p>
e.	JPMorgan Chase	<p>Notoriously known to be directing the investing activities of Morgan Stanley, T. Rowe Price, Goldman Sachs regarding all things Facebook via Chairman Jamie Dimon. Castlight Health and athenahealth Director Ann H. Lamont is married to Edward "Ned" Lamont, grandson of the founder of JPMorgan, Thomas W. Lamont. Castlight Health and athenahealth are embroiled in the Obamacare and HealthCare.gov scandal. U.S. CTO Todd Y. Park is founder of both athenahealth and Castlight Health. Park's brother, David Y. Park, is the current chief operating officer at athenahealth. Todd Y. Park has advised the Obama administration that they are clear to make the claim that HealthCare.gov technology is open source, despite the evident <i>Leader v. Facebook</i> frauds, among others. The Lamont's hold substantial amounts of Goldman Sachs, JPMorgan and Morgan Stanley holdings which benefited remarkably from Facebook transactions.</p> <p>Ann Huntress Lamont (a.k.a. Ann H. Lamont) and Edward M. ("Ned") investments in Facebook Club Funds, invested by 2006, prepared Nov. 26, 2013 <http://www.scribd.com/doc/187452662/Ann-Huntress-Lamont-a-k-a-Ann-H-Lamont-and-Edward-M-Ned-investments-in-Facebook-Club-Funds-invested-by-2006-prepared-Nov-26-2013>; See also <https://docs.google.com/file/d/0B2SfG2nEsMfgckwwdGg2Yy10NWs/edit>.</p>

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<p>f.</p>	<p>Microsoft</p>	<p>Microsoft is one of Facebook's largest shareholders. This fact is notoriously known. In addition, Microsoft is a director in the "Leaders Circle" of the Federal Circuit Bar Association (FCBA), which made an appearance in the <i>Leader v. Facebook</i> appeal. Microsoft's counsel in the Microsoft v. i4i case in 2011 was Facebook's appeals attorney in Leader v. Facebook—Thomas G. Hungar, Gibson Dunn LLP. Chief Justice John G. Roberts, Jr. recused himself from that matter due to his relationship to Hungar and Microsoft. In fact, Thomas G. Hungar, Gibson Dunn LLP, was "counsel of record" for Microsoft. Also representing Microsoft in i4i was Weil Gotshal LLP, who also made an appearance for the FCBA in <i>Leader v. Facebook</i>. Despite Justice Roberts' recusal in Microsoft v. i4i, he failed to recuse himself in this matter where his conflicts were markedly more obvious, including his holdings in such Facebook "dark pool" funds as Fidelity Contrafund K which held stock in Facebook and numerous notoriously known Facebook cartel members, including athenahealth, Microsoft, Goldman Sachs, Dropbox, IBM, JPMorgan, LinkedIn, Morgan Stanley, State Street Corp, Tesla Motors, Baidu (China), and Mail.ru (Russia).</p> <p>Response to Request of Federal Circuit Bar Association's Request for Reissue Re. <i>Leader v. Facebook</i>, Case No. 2011-1366 (Fed. Cir.) by Lakshmi Arunachalam, Ph.D., Sep. 17, 2012 http://www.scribd.com/doc/106156081/Response-to-Request-of-Federal-Circuit-Bar-Association-s-Request-for-Reissue-Re-Leader-v-Facebook-Case-No-2011-1366-Fed-Cir-by-Lakshmi-Arunach>.</p> <p>Federal Circuit Bar Online Community, Leaders Circle 2013, accessed Dec. 10, 2013 <http://www.scribd.com/doc/190739193/Federal-Circuit-Bar-Online-Community-Leaders-Circle-2013-accessed-Dec-10-2013>.</p> <p>Microsoft Corp. v. i4i Ltd. Partnership, 131 S. Ct. 2238 - Supreme Court 2011.</p>
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g.	Morgan Stanley	Facebook's underwriter and large investor, notoriously known. Morgan Stanley also received a \$13+ billion 2008 stimulus grant which was overseen by Facebook collaborator Lawrence "Larry" Summers , who had just recently received hundreds of thousands in speaking stipends from Morgan Stanley compatriots at Goldman Sachs earlier that year, among other perks. Summers counts Facebook COO Sheryl K. Sandberg as his protégé and former employee at the World Bank and U.S. Treasury .
h.	State Street Corporation	Fellow recipient with Goldman Sachs and Morgan Stanley of approximately \$33 billion (collectively) in 2008 stimulus funds overseen by Facebook collaborator Lawrence "Larry" Summers , who had just recently received hundreds of thousands in speaking stipends from Goldman earlier that year, among other perks.
i.	UBS	A Facebook IPO underwriter along with Goldman Sachs and Morgan Stanley , notoriously known.
ix.	Wal-Mart	Facebook's largest investor and director, James W. Breyer, Accel Partners LLP , was also a director at Wal-Mart and was responsible for a deep embedding of Facebook technology in the Wal-Mart site. Breyer resigned as a long time director of Wal-Mart after the Mexican bribery scandal was uncovered. "Vast Mexico Bribery Case Hushed Up by Wal-Mart After Top-Level Struggle - Confronted with evidence of widespread corruption in Mexico, top Wal-Mart executives focused more on damage control than on rooting out wrongdoing, an examination by The New York Times found" by David Barstow, <i>The New York Times</i> , Apr. 21, 2012 < http://www.nytimes.com/2012/04/22/business/at-wal-mart-in-mexico-a-bribe-inquiry-silenced.html?pagewanted=all&_r=0 >.

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d.	Xerox Corp.	<p>Facebook's expert witness, Dr. Saul Greenberg, is closely associated and was formerly employed by Xerox Corp. and asserted a number of Xerox patents as alleged prior art at the <i>Leader v. Facebook</i> trial. Despite losing his arguments at trial, and in two patent reexaminations, Facebook continues to press these Xerox patents. Facebook somehow got Patent Office Director, David J. Kappos, to order an unprecedented third patent reexam of Leader's U.S. Patent No. 7,139,761. The patent examiner, Deandra Hughes has dramatically reversed her longstanding opinions on these Xerox assertions. As troubling, Kappos assigned judge Stephen C. Siu as chief patent judge in this matter, despite the fact that no one disclosed that Judge Siu was formerly employed by Microsoft.</p> <p>David J. Kappos holds substantial Facebook "dark pool" stock acquired within weeks after being appointed director of the Patent Office by President Obama.</p> <p>"Expert witness practiced 'dark arts'" by Origins of Facebook's Technology, Aug. 23, 2011 <http://facebook-technology-origins.blogspot.com/2011/08/lesson-in-expert-witness-dark-arts.html>.</p> <p>Testimony of Dr. Saul Greenberg, Expert Witness, Facebook, <i>Leader v. Facebook</i> - Trial Transcript, Fri. Jul. 23, 2010 <http://www.scribd.com/doc/87481961/Leader-v-Facebook-Trial-Transcript-Fri-Jul-23-2010>.</p> <p>US Patent Office FOIA APPEAL, F-13-00218 in <i>Leader v. Facebook</i>, Aug. 21, 2013 <http://www.scribd.com/doc/165490215/US-Patent-Office-FOIA-APPEAL-F-13-00218-in-Leader-v-Facebook-Aug-21-2013>.</p> <p>Kappos, David J. Executive Branch Personnel PUBLIC FINANCIAL DISCLOSURE REPORT, U.S. Office of Gov't Ethics, May 16, 2009 <http://www.scribd.com/doc/182725282/Kappos-David-J-Executive-Branch-Personnel-PUBLIC-FINANCIAL-DISCLOSURE-REPORT-U-S-Office-of-Gov-t-Ethics-May-16-2009>.</p>
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Evidence Resources:

1. **Conflicts Analysis:** The most comprehensive archive of judicially recognizable source material and conflicts of interest analysis is accessible from the *Leader v. Facebook* investigative news reporting Google search tool at <http://americans4innovation.blogspot.com>.
2. **VBTIX, VBMFX Vanguard Total Bond Market Index I Annual Report**, Vanguard/Morningstar, December 31, 2012, accessed Jan. 19, 2014 <<http://quote.morningstar.com/fund-filing/Annual-Report/2012/12/31/t.aspx?t=VBTIX&ft=N-CSR/A&d=861df3c7d55aae52a424cdd1e0f4aa82>>.
3. **VBTIX, VBMFX Vanguard Total Bond Market Index I Annual Report**, Vanguard/Morningstar, December 31, 2012, accessed Jan. 19, 2014 <<https://www.actionsxchangerepository.fidelity.com/ShowDocument/ComplianceEnvelope.htm?fax=-18%2342%23-61%23-110%23114%2378%23117%2320%23-1%2396%2339%23-62%23-21%2386%23-100%2337%2316%2335%23-68%2391%23-66%2354%23103%23-16%2369%23-30%2358%23-20%2376%23-84%23-11%23-87%230%23-50%23-20%23-92%23-98%23-116%23-28%2358%23-38%23-43%23-39%23-42%23-96%23-88%2388%23-45%23-28%23-82%2318%2398%23-55%23-36%23-18%23-102%23-74%235%23-89%23-105%23-67%23126%2377%23-126%23100%2345%23-44%23-73%23-15%238%23-21%23-37%23-17%23-14%23-98%23123%23-18%2345%23-59%23-82%2367%2383%23112%2317%2370%23-78%2378%23-50%2336%23-86%23-90%2381%23-21%23-119%23-30%23120%2349%2328%23-98%2333%2351%23-78%23-119%23-16%2350%23-58%2350%23102%2348%23-17%2352%23-99%23>>.
4. **VBTIX , VBMFX Vanguard Total Bond Market Index, EDGAR**, Dec. 31, 2012, accessed Jan. 19, 2014 <<http://www.sec.gov/Archives/edgar/data/794105/000093247113008064/0000932471-13-008064-index.htm>> | CIK [0000794105](http://www.sec.gov/Archives/edgar/data/794105/000093247113008064/0000932471-13-008064-index.htm) | Series [S000002564](http://www.sec.gov/Archives/edgar/data/794105/000093247113008064/0000932471-13-008064-index.htm) | Vanguard Total Bond Market Index Fund | Class/Contract [C000007064](http://www.sec.gov/Archives/edgar/data/794105/000093247113008064/0000932471-13-008064-index.htm) | Institutional Shares VBTIX.

March 13, 2009

Robert E. Coyle
Designated Agency Ethics Official
Department of Homeland Security
Washington, DC 20528-3650

Dear Mr. Coyle:

The purpose of this letter is to describe the steps that I will take to avoid any actual or apparent conflict of interest in the event that I am confirmed for the position of General Counsel, Department of Homeland Security.

As required by 18 U.S.C. § 208(a), I will not participate personally and substantially in any particular matter that has a direct and predictable effect on my financial interests or those of any person whose interests are imputed to me, unless I first obtain a written waiver, pursuant to 18 U.S.C. § 208(b)(1), or qualify for a regulatory exemption, pursuant to 18 U.S.C. § 208(b)(2). I understand that the interests of the following persons are imputed to me: any spouse or minor child of mine; any general partner of a partnership in which I am a limited or general partner; any organization in which I serve as officer, director, trustee, general partner or employee; and any person or organization with which I am negotiating or have an arrangement concerning prospective employment.

Before entering Government service, I will resign from my position as Chief Legal Officer and Secretary of Cardinal Health. Pursuant to my Offer Letter and Severance Agreement, I will receive a pro-rated bonus in September 2009 that covers only the period of FY09 prior to my resignation and a severance payment in October 2009. Cardinal Health will use an objective formula to calculate both payments. Through the end of the fiscal year on June 30, 2009, I will not participate personally and substantially in any particular matter that has a direct and predictable effect of the financial interests of Cardinal Health unless I first obtain a written waiver, pursuant to 18 U.S.C. § 208(b)(1). Until I have received the bonus and severance payments, I will not participate personally and substantially in any particular matter that would have a direct and predictable affect on the ability or willingness of Cardinal Health to make these payments to me, unless I first obtain a written waiver, pursuant to 18 U.S.C. § 208(b)(1).

Pursuant to my Offer Letter and standard Cardinal Health practice, and memorialized in my Severance Agreement, on my termination date I will receive an accelerated vesting of 45,206 unvested stock options and an accelerated vesting of 7,072 restricted share units. The expiration date for all stock options will be moved up to March 2012. I also hold shares of Cardinal Health common stock. Upon my termination

Cardinal Health has agreed also to accelerate the vesting of 22,071 restricted share units that I received pursuant to my Restricted Share Unit and Severance Agreements. I will forfeit all of my remaining unvested stock options, 46,997 options, and restricted share units, 7,557 units. For as long I hold stock or stock options in Cardinal Health, I will not participate personally and substantially in any particular matter that has a direct and predictable effect on the financial interests of Cardinal Health unless I first obtain a written waiver, pursuant to 18 U.S.C § 208(b)(1). For a period of two years from my termination date, I will not participate personally and substantially in any particular matter involving specific parties in which Cardinal Health, is a party or represents a party, unless I first receive a written waiver pursuant to 5 C.F.R. § 2635.503(c).

Upon confirmation, I will resign from my positions as Director, Asian Pacific American Bar Association of Central Ohio; Chairman, Association of Corporate Counsel; Director, Cardinal Health Foundation; Director, Columbus Bar Foundation; and Director, Pro Bono Partnership. For a period of one year after my resignation, I will not participate personally and substantially in any particular matter involving specific parties in which any of these organizations is a party or represents a party, unless I am first authorized to participate, pursuant to 5 C.F.R. § 2635.502(d).

Finally, I own shares of Schwab Managed Retirement Trust 2030 Fund Class III. The fund is not an entity registered under the Investment Company Act of 1940 and does not qualify for a regulatory exemption pursuant to 18 U.S.C. § 208(b)(2). A fraction of the fund's underlying assets are foreign securities, which also do not qualify for a regulatory exemption. I will divest my interest in Schwab Managed Retirement Trust 2030 Fund Class III within 90 days of my confirmation. I will not participate personally and substantially in any particular matter that has a direct and predictable effect on the financial interests of this entity, or its underlying assets, unless I first obtain a written waiver, pursuant to 18 U.S.C. § 208(b)(1).

Sincerely,



Ivan K. Fong