

**Amy B. Jackson, District Judge, District of Columbia**

**Financial Disclosure, 2012**

(\*.xlsx) spreadsheet attached to this PDF)

Amy B. Jackson Financial Disclosure 2012, submitted  
May 06, 2013

Amy B. Jackson Financial Disclosure 2012, submitted May 06, 2013														Top Ten Holdings (some foreign companies need further verification)										SEC Reporting Date																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																		
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	See also Bibliography following for a PDF version of these SEC-linked Edgar Reports													Companies (~43%) in <b><i>bold italic</i></b> are members, donors and stakeholders in <b><i>The Clinton Foundation</i></b> and the <b><i>Clinton Global Initiative</i></b> in one of its 36 subordinate enties (Add Fidelity Funds (16-19), Capital One (6,7) as direct Clinton Foundation donors	
17	<a href="#">Fidelity Advisor Emerging Asia CL C (FERCX)</a>	\$ 15,000										\$ 15,000	Tencent Holdings Ltd. , Taiwan Semiconductor Manufacturing Co. Ltd. , <b><i>Alibaba Group Holding Ltd. sponsored ADR</i></b> , AIA Group Ltd. , Reliance Industries Ltd. , <b><i>Samsung Electronics Co. Ltd.</i></b> , Housing Development Finance Corp. Ltd. , China Construction Bank Corp. (H Shares) , HKT Trust/HKT Ltd. unit , PT Bank Central Asia Tbk	SEC October 31, 2018	
18	<a href="#">Fidelity Advisors New Insights C (FNICK)</a>		\$ 50,000									\$ 50,000	<b><i>Facebook, Amazon, Alphabet/Google, Bank of America</i></b> , Berkshire Hathaway, <b><i>Microsoft, UnitedHealth, Visa, Adobe, Citigroup</i></b>	SEC December 31, 2017	
19	<a href="#">Fidelity Freedom 2020 (FFFDX)</a>		\$ 50,000									\$ 50,000	NOTE: Fidelity was the top investor in the Facebook initial public offering among all mutual funds. Fidelity's technology manager, <b><i>Robert Ketterson</i></b> , and <b><i>In-Q-Tel C.I.A. asset Gilman Louie</i></b> , served on the board of the <b><i>National Venture Capital Association (NCVA)</i></b> with <b><i>Facebook</i></b> chairman and lead inside investor, <b><i>James W. Breyer</i></b> and <b><i>Accel Partners LLP</i></b> ; Fidelity Series Investment Grade Bond Fund , Fidelity Series Government Money Market Fund 1.67% , Fidelity Advisor Series Growth & Income Fund , Fidelity Series Emerging Markets Fund , Fidelity Series International Growth Fund , Fidelity Series International Value Fund , Fidelity Advisor Series Stock Selector Large Cap Value Fund , Fidelity Advisor Series Equity Value Fund , Fidelity Advisor Series Equity Growth Fund , Fidelity Advisor Series Opportunistic Insights Fund	SEC March 31, 2018	
20	<a href="#">First Eagle Global Fund Class A (SGENX)</a>		\$ 50,000									\$ 50,000	Gold bullion, <b><i>Oracle</i></b> , Exxon Mobil, Comcast, <b><i>Schlumberger</i></b> , KDDI, Omnicom Group, FANUC Corp, Seom, Sampo Holdings	SEC October 31, 2018	
21	<a href="#">FPCIZ</a>			\$ 100,000								\$ 100,000	?		
22	<a href="#">Greenspring Fund Inc (GRSPX)</a>	\$ 15,000										\$ 15,000	Republic Services, Discover, EMCOR, Southern National Bancorp of Virginia, MasTec, Conduent, MYR Group, Johnson Controls, Sherwin-Williams, Suncor Energy	SEC December 31, 2017	
23	<a href="#">Ivy Asset Strategy Fund Class I (IVAEX)</a>		\$ 50,000									\$ 50,000	<b><i>Microsoft, AIA Group, JPMorgan Chase, Amazon, Adobe, Airbus, Pfizer, Alphabet/Google</i></b> , Lockheed, Intuit	SEC March 31, 2018	
24	<a href="#">Ivy Science and Technology Fund Class I (ISTIX)</a>			\$ 100,000								\$ 100,000	Micron Technology, Microsoft, <b><i>Apple</i></b> , WNS (Holdings), <b><i>Alibaba</i></b> , Aspen Technology, Vertex Pharmaceuticals, <b><i>Facebook</i></b> , Cypress Semiconductor, ACI Worldwide	SEC March 31, 2018	
25	<a href="#">Matthews Asian Growth and Income Fund Investor Class (MACSX)</a>			\$ 100,000								\$ 100,000	<b><i>Taiwan Semiconductor Manufacturing, AIA Group/Rockefeller Foundation</i></b> , United Overseas Bank, Singapore Telecommunications, Ascendas, REIT, Genting Malaysia, CapitaLand, Samsung Electronics, <b><i>HSBC Holdings PLC</i></b> , Broadcom	SEC December 31, 2017	
26	<a href="#">Oppenheimer Developing Markets Fund Class Y (ODVYX)</a>			\$ 100,000								\$ 100,000	<b><i>Taiwan Semiconductor, Alibaba, Tencent Holdings, Novatek PJSC, Glencore, Kering, Housing Development Finance, Kotak Mahindra Bank, LVMH Moet Hennessy Louis Vuitton SE, AIA Group</i></b>	SEC August 31, 2018	
27	<a href="#">Oppenheimer Discovery Mid Cap Growth C (OEGCX)</a>		\$ 50,000									\$ 50,000	Total System Services, Waste Connections, <b><i>WellCare Health Plans, TransUnion, CoStar Group</i></b> , Lamb Weston Holdings, Roper Technologies, CDW, Progressive Corp, ServiceNow,	SEC October 31, 2018	
28	<a href="#">RFC17A</a>		\$ 50,000									\$ 50,000	?		
29	<a href="#">Royce Value Trust Inc (RVT+B)</a>	\$ 15,000										\$ 15,000	Ash Grove Cement, FLIR Systems, HEICO Corporation, Coherent, Cognex Corporation, Sun Hydraulics, Quaker Chemical, Copart, RBC Bearings, E-L Financial	SEC December 31, 2017	

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30	Schwab Money Market Fund	\$ 15,000										\$ 15,000	?
31	State of Israel Bonds			\$ 100,000								\$ 100,000	?
32	<a href="#">TCW Total Return Bond Fund CL I (TGLMX)</a>			\$ 100,000								\$ 100,000	Goldman Sachs, 321 Henderson Recievables I, Fannie Mae, Freddie Mac, Ginnie Mae, Banc of America, ACE Securities, Chase Mortgage, Bear Stearns/JPMorgan, CIM Trust, BCAP LLC, Citigroup, Credit Suisse, Countrywide, JPMorgan Mortgage, Lehman Mortgage/Nomura/Barclays, Merrill Lynch, Morgan Stanley, Nomura, WaMu Mortgage, Suntrust, Washington Mutual, Wells Fargo, State Street
33	<a href="#">Templeton Global Bond Fund Advisor Class (TGBAX)</a>			\$ 100,000								\$ 100,000	Bank of America, Barclays, Citigroup, Deutsche Bank, Goldman Sachs, HSBC Bank, JP Morgan Chase, Morgan Stanley, Standard Chartered Bank, UBS AG
34	<a href="#">Templeton Global Total Return Fund Class Advisor (TTRZX)</a>			\$ 100,000								\$ 100,000	Bank of America Corp., Barclays Bank PLC, Citigroup, Inc., Deutsche Bank AG, The Goldman Sachs Group Inc., HSBC Bank PLC, JP Morgan Chase & Co., Morgan Stanley, Standard Chartered Bank, UBS AG
35	<a href="#">TFS Market Neutral Fund (TFSMX)</a>		\$ 50,000									\$ 50,000	Samsung Electronics, Tencent, Alibaba, Naspers, Ping An Insurance (Group) Company of China, Sberbank Russia OJSC, China Lodging Group, JD.com, CIE Automotive, Beijing Capital International Airport Co
36	Trout Cacheris Capital Account		\$ 50,000									\$ 50,000	
37	<a href="#">Van Eck Global Hard Assets Fund I (GHAIX)</a>		\$ 50,000									\$ 50,000	First Quantum Minerals, Glencore Xstrata, Teck Resources, Diamondback Energy, Pioneer Natural Resources, Concho Resources, EOG Resources, Parsley Energy, Newmont Mining, Patterson-UTI Energy
38	<a href="#">VanEck Vectors Agribusiness ETF (MOO)</a>	\$ 15,000										\$ 15,000	Deere & Co, Zoetis Inc, Nutrien, Archer-Daniels-Midland, Kubota Corp, Idexx Laboratories, Tyson Foods, Tractor Supply, Mosaic, Mowi Asa
39	<a href="#">Vanguard Dividend Appreciation ETF (VIG)</a>				\$ 250,000							\$ 250,000	Microsoft, Johnson & Johnson, PepsiCo, 3M, Medtronic, United Technologies, Texas Instruments, Union Pacific, Abbott Laboratories, Accenture
40	<a href="#">Vanguard Dividend Growth Inv (VDIGX)</a>				\$ 250,000							\$ 250,000	BP, Chevron, Diamondback Energy, EOG Resources, Exxon Mobil, Pioneer Natural Resources, Royal Dutch Shell, Schlumberger, TOTAL SA, Valero Energy
41	<a href="#">Voya MidCap Opportunities I (NMCIX)</a>		\$ 50,000									\$ 50,000	Apple, Microsoft, Alphabet/Google, Amazon, PepsiCo, UnitedHealth, Comcast, Mastercard, Home Depot, Facebook, The Bank of New York Mellon
42	Wachovia Bank - joint account with parent				\$ 250,000							\$ 250,000	Wachovia/Wells Fargo
43	Wachovia Banks				\$ 250,000							\$ 250,000	Wachovia/Wells Fargo
44	Wells Fargo Bank Account	\$ 15,000										\$ 15,000	Wells Fargo
Total		\$210,000	\$700,000	\$1,100,000	\$1,250,000							\$ 3,260,000	
Cumulative Total		\$210,000	\$910,000	\$2,010,000	\$3,260,000								

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**Amy B. Jackson, District Judge, District of Columbia**

**Financial Disclosure, 2012**

(\*.xlsx) spreadsheet attached to this PDF)

Amy B. Jackson Financial Disclosure 2012, submitted May 06, 2013		J - \$0-\$1,000	K - \$1,001-\$50,000	L - \$50,001-\$100,000	M - \$100,001-\$250,000	N - \$250,001-\$500,000	O - \$500,001-\$1,000,000	P1 - \$1,000,001-\$5,000,000	P2 - \$5,000,001-\$10,000,000	P3 - \$10,000,001-\$50,000,000	P4 - \$50,000,001-\$100,000,000	P5 - \$100,000,001-\$500,000,000	SUBTOTALS	Top Ten Holdings (some foreign companies need further verification)	SEC Reporting Date
No.	Holding (SEC URL):													  	
	See also Bibliography following for a PDF version of these SEC-linked Edgar Reports													Companies (~43%) in <b>bold italic&gt;</b> are members, donors and stakeholders in <b>The Clinton Foundation</b> and the <b>Clinton Global Initiative</b> in one of its 36 subordinate entities (Add Fidelity Funds (16-19), Capital One (6,7) as direct Clinton Foundation donors	

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# FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2012

Report Required by the Ethics  
in Government Act of 1978  
(5 U.S.C. app. §§ 101-111)

<b>1. Person Reporting</b> (last name, first, middle initial)  Jackson, Amy B.	<b>2. Court or Organization</b>  United States District Court for the District of Columbia	<b>3. Date of Report</b>  05/06/2013
<b>4. Title</b> (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)  District Judge - active	<b>5a. Report Type</b> (check appropriate type) <input type="checkbox"/> Nomination      Date <input type="checkbox"/> Initial <input checked="" type="checkbox"/> Annual <input type="checkbox"/> Final <b>5b.</b> <input type="checkbox"/> Amended Report	<b>6. Reporting Period</b>  01/01/2012 to 12/31/2012
<b>7. Chambers or Office Address</b>  United States District Court for the District of Columbia 300 Constitution Avenue, N.W. Washington, D.C. 20001		
<p align="center"><b>IMPORTANT NOTES:</b> The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.</p>		

## I. POSITIONS. (Reporting individual only; see pp. 9-13 of filing instructions.)

☒ NONE (No reportable positions.)

POSITION

NAME OF ORGANIZATION/ENTITY

1.		
2.		
3.		
4.		
5.		

## II. AGREEMENTS. (Reporting individual only; see pp. 14-16 of filing instructions.)

☐ NONE (No reportable agreements.)

DATE

PARTIES AND TERMS

1. May 2008	Trout Cacheris Am. and Restated Operat'g Agreem't provides payout of withdrawing Member's Capital Acct over 3 year period (no control). Payout began in 2011.
2.	
3.	

**FINANCIAL DISCLOSURE REPORT**

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Name of Person Reporting

Jackson, Amy B.

Date of Report

05/06/2013

**III. NON-INVESTMENT INCOME.** *(Reporting individual and spouse; see pp. 17-24 of filing instructions.)***A. Filer's Non-Investment Income**NONE *(No reportable non-investment income.)*

<u>DATE</u>	<u>SOURCE AND TYPE</u>	<u>INCOME</u> (yours, not spouse's)
1.		
2.		
3.		
4.		

**B. Spouse's Non-Investment Income -** *If you were married during any portion of the reporting year, complete this section.**(Dollar amount not required except for honoraria.)*NONE *(No reportable non-investment income.)*

<u>DATE</u>	<u>SOURCE AND TYPE</u>
1. 2012	Kelley Drye, LLP (law firm partnership income; partnership concluded 7/31/2012)
2.	
3.	
4.	

**IV. REIMBURSEMENTS** – *transportation, lodging, food, entertainment.**(Includes those to spouse and dependent children; see pp. 25-27 of filing instructions.)*NONE *(No reportable reimbursements.)*

<u>SOURCE</u>	<u>DATES</u>	<u>LOCATION</u>	<u>PURPOSE</u>	<u>ITEMS PAID OR PROVIDED</u>
1.				
2.				
3.				
4.				
5.				



**FINANCIAL DISCLOSURE REPORT**

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Name of Person Reporting

Jackson, Amy B.





Date of Report

05/06/2013

**V. GIFTS.** *(Includes those to spouse and dependent children; see pp. 28-31 of filing instructions.)*NONE *(No reportable gifts.)*

	<u>SOURCE</u>	<u>DESCRIPTION</u>	<u>VALUE</u>
1.			
2.			
3.			
4.			
5.			

**VI. LIABILITIES.** *(Includes those of spouse and dependent children; see pp. 32-33 of filing instructions.)*NONE *(No reportable liabilities.)*

	<u>CREDITOR</u>	<u>DESCRIPTION</u>	<u>VALUE CODE</u>
1.		College tuition 2011-12	K
2.		College tuition 2011-12	K
3.		College tuition 2012-13	K
4.		College tuition 2012-13	K
5.			

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Jackson, Amy B.

Date of Report

05/06/2013

## VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A. Description of Assets (including trust assets)  Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
	(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
1. Capital One (formerly Chevy Chase Bank)	A	Interest	J	T					
2. Captial One Young Savers Accounts	A	Interest	J	T					
3. CD Captial One, 13 month	A	Interest	J	T					
4. CD Captial One, 13 month	A	Interest	J	T					
5. Trout Cacheris Capital Account		None	K	T	Distributed (part)	02/22/12	J		
6.					Distributed (part)	05/24/12	J		
7.					Distributed (part)	08/28/12	J		
8.					Distributed (part)	11/21/12	J		
9. FPCIZ	A	Dividend	L	T					
10.	C	Distribution							
11. GRSPX		None			Sold	03/06/12	J	A	
12. TFSMX		None			Sold	04/12/12	K	A	
13. IVAEX		None			Sold	04/11/12	K		
14. GHAIK		None			Buy (add'l)	04/11/12	K		
15.					Sold (part)	10/11/12	K	A	
16.					Sold	11/29/12	K	A	
17. SGIIX	A	Dividend	L	T					

1. Income Gain Codes:  
(See Columns B1 and D4)

A=\$1,000 or less  
F=\$50,001 - \$100,000

B=\$1,001 - \$2,500  
G=\$100,001 - \$1,000,000

C=\$2,501 - \$5,000  
H1=\$1,000,001 - \$5,000,000

D=\$5,001 - \$15,000  
H2=More than \$5,000,000

E=\$15,001 - \$50,000

2. Value Codes  
(See Columns C1 and D3)

J=\$15,000 or less  
N=\$250,001 - \$500,000  
P3=\$25,000,001 - \$50,000,000

K=\$15,001 - \$50,000  
O=\$500,001 - \$1,000,000

L=\$50,001 - \$100,000  
P1=\$1,000,001 - \$5,000,000  
P4=More than \$50,000,000

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

3. Value Method Codes  
(See Column C2)

Q=Appraisal  
U=Book Value

R=Cost (Real Estate Only)  
V=Other

S=Assessment  
W=Estimated

T=Cash Market

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Jackson, Amy B.

Date of Report

05/06/2013

## VII. INVESTMENTS and TRUSTS – income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A. Description of Assets (including trust assets)  Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
	(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
18.	B	Distribution							
19. ISTIX	A	Distribution	L	T	Sold (part)	10/18/12	K	C	
20. TGLMX	A	Dividend	K	T	Buy	06/21/12	J		
21.					Buy	07/31/12	J		
22. RYOTX		None			Sold	07/31/12	J	A	
23. ODVYX	A	Dividend	L	T					
24. MICSX	B	Dividend	L	T					
25. TTRZX	C	Dividend	L	T					
26.	A	Distribution							
27. MFLDX	A	Distribution	L	T	Buy (add'l)	09/11/12	K		
28. MOO	A	Dividend	J	T					
29. YACKX	B	Dividend	M	T					
30.	A	Distribution							
31. PAUIX	B	Dividend	J	T					
32. DBLTX	B	Dividend	K	T					
33. VIG	C	Dividend	M	T					
34. MERDX	A	Dividend			Sold	09/19/12	K	A	

1. Income Gain Codes:  
(See Columns B1 and D4)

A = \$1,000 or less  
F = \$50,001 - \$100,000

B = \$1,001 - \$2,500  
G = \$100,001 - \$1,000,000

C = \$2,501 - \$5,000  
H1 = \$1,000,001 - \$5,000,000

D = \$5,001 - \$15,000

E = \$15,001 - \$50,000

2. Value Codes  
(See Columns C1 and D3)

J = \$15,000 or less  
N = \$250,001 - \$500,000  
P3 = \$25,000,001 - \$50,000,000

K = \$15,001 - \$50,000  
O = \$500,001 - \$1,000,000

L = \$50,001 - \$100,000  
P1 = \$1,000,001 - \$5,000,000  
P4 = More than \$50,000,000

H2 = More than \$5,000,000  
M = \$100,001 - \$250,000  
P2 = \$5,000,001 - \$25,000,000

3. Value Method Codes  
(See Column C2)

Q = Appraisal  
U = Book Value

R = Cost (Real Estate Only)  
V = Other

S = Assessment  
W = Estimated

T = Cash Market

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Jackson, Amy B.

Date of Report

05/06/2013

## VII. INVESTMENTS and TRUSTS -- income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐

NONE (No reportable income, assets, or transactions.)

A. Description of Assets (including trust assets)  Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
	(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
35.	C	Distribution							
36. GLRIX	B	Dividend	L	T					
37. LCMAX		None			Sold	03/06/12	K	A	
38. THOPX	B	Dividend	L	T					
39.	A	Distribution							
40.					Buy (add'l)	03/06/12	J		
41.					Sold (part)	10/15/12	J	A	
42.					Buy (add'l)	10/18/12	K		
43. VDIGX	B	Dividend	M	T	Buy	03/06/12	K		
44.					Buy (add'l)	04/11/12	K		
45.					Buy (add'l)	11/29/12	K		
46. HIEMX	A	Dividend	K	T	Buy	10/11/12	K		
47.	A	Distribution							
48.					Buy (add'l)	11/29/12	K		
49. NMCIX		None	K	T	Buy	12/19/12	K		
50. CWGCX	A	Dividend	K	T					
51. MDFGX		None	K	T					

1. Income Gain Codes:  
(See Columns B1 and D4)

A = \$1,000 or less  
F = \$50,001 - \$100,000

2. Value Codes  
(See Columns C1 and D3)

J = \$15,000 or less  
N = \$250,001 - \$500,000  
P3 = \$25,000,001 - \$50,000,000

3. Value Method Codes  
(See Column C2)

Q = Appraisal  
U = Book Value

B = \$1,001 - \$2,500

G = \$100,001 - \$1,000,000

K = \$15,001 - \$50,000

O = \$500,001 - \$1,000,000

R = Cost (Real Estate Only)

V = Other

C = \$2,501 - \$5,000

I11 = \$1,000,001 - \$5,000,000

L = \$50,001 - \$100,000

P1 = \$1,000,001 - \$5,000,000

P4 = More than \$50,000,000

S = Assessment

W = Estimated

D = \$5,001 - \$15,000

I12 = More than \$5,000,000

M = \$100,001 - \$250,000

P2 = \$5,000,001 - \$25,000,000

T = Cash Market

E = \$15,001 - \$50,000

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Jackson, Amy B.

Date of Report

05/06/2013

## VII. INVESTMENTS and TRUSTS – income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A. Description of Assets (including trust assets)  Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
	(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
52. MCFGX	A	Dividend	K	T					
53. MDLOX	A	Dividend	K	T					
54. MCLOX	A	Dividend	L	T					
55. BRECX	A	Dividend	J	T					
56. ECGIX		None	L	T					
57. ECHSX	A	Distribution	J	T					
58. FERCX	A	Dividend	K	T					
59. FAVCX	A	Dividend	J	T					
60. FBTCX		None	J	T					
61. FNICX		None	L	T					
62. HWLCX	A	Dividend	J	T					
63. OEGCX		None	K	T					
64. LGVAX	A	Dividend	J	T					
65. RFC17A		None	K	T					
66. Schwab Money Market Fund	A	Interest	J	T					
67. ML Bank Dep Prog/1AXX - FIA Card SVS NA RASP MONEY MKT	A	Interest	K	T					
68. FGCKX	A	Int./Div.			Sold	12/04/12	K		

1. Income Gain Codes:  
(See Columns B1 and D4)

A = \$1,000 or less  
F = \$50,001 - \$100,000

B = \$1,001 - \$2,500  
G = \$100,001 - \$1,000,000

C = \$2,501 - \$5,000  
H1 = \$1,000,001 - \$5,000,000

D = \$5,001 - \$15,000

E = \$15,001 - \$50,000

2. Value Codes  
(See Columns C1 and D3)

J = \$15,000 or less  
N = \$250,001 - \$500,000  
P3 = \$25,000,001 - \$50,000,000

K = \$15,001 - \$50,000  
O = \$500,001 - \$1,000,000

L = \$50,001 - \$100,000  
P1 = \$1,000,001 - \$5,000,000  
P4 = More than \$50,000,000

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

3. Value Method Codes  
(See Column C2)

Q = Appraisal  
U = Book Value

R = Cost (Real Estate Only)  
V = Other

S = Assessment  
W = Estimated

T = Cash Market

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Jackson, Amy B.

Date of Report

05/06/2013

## VII. INVESTMENTS and TRUSTS — income, value, transactions (Includes those of spouse and dependent children; see pp. 34-60 of filing instructions.)

☐ NONE (No reportable income, assets, or transactions.)

A. Description of Assets (including trust assets)  Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
	(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
69. FXSIX	A	Int./Div.			Sold	12/04/12	K		
70. FFKDX	A	Int./Div.			Sold	12/04/12	J		
71. FXSTX	A	Int./Div.			Sold	12/04/12	K		
72. FID MGD INC PORT	A	Int./Div.			Sold	12/04/12	J		
73. DC College Savings Plan 17+		None	K	T					
74. DC College Savings Plan 17+		None	K	T					
75. State of Israel Bonds	B	Interest	L	T					
76. Wachovia Bank	B	Interest	M	T					
77. Wells Fargo Bank account	A	Interest	J	T					
78.									
79.									
80.									
81.									
82.									
83.									
84.									
85.									

1. Income Gain Codes:  
(See Columns B1 and D4)

A = \$1,000 or less  
F = \$50,001 - \$100,000

B = \$1,001 - \$2,500  
G = \$100,001 - \$1,000,000

C = \$2,501 - \$5,000  
H1 = \$1,000,001 - \$5,000,000

D = \$5,001 - \$15,000

E = \$15,001 - \$50,000

2. Value Codes  
(See Columns C1 and D3)

J = \$15,000 or less  
N = \$250,001 - \$500,000  
P3 = \$25,000,001 - \$50,000,000

K = \$15,001 - \$50,000  
O = \$500,001 - \$1,000,000

L = \$50,001 - \$100,000  
P1 = \$1,000,001 - \$5,000,000  
P4 = More than \$50,000,000

H2 = More than \$5,000,000  
M = \$100,001 - \$250,000  
P2 = \$5,000,001 - \$25,000,000

3. Value Method Codes  
(See Column C2)

Q = Appraisal  
U = Book Value

R = Cost (Real Estate Only)  
V = Other

S = Assessment  
W = Estimated

T = Cash Market

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Jackson, Amy B.

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05/06/2013

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

Concerning I. Positions:

The positions listed in the 2011 report concluded during 2011; Trout Cacheris membership ended 3/31/11 and Personal Representative of Estate position ended 9/30/11. This is also why Assets in Estate A, listed on line 123 of the 2011 report, are not listed in 2012.

Concerning VII. Investments and Trusts:

Line 5: Trout Cacheris Capital Account is being paid out quarterly over a three year period, in increments of \$8250, per the Operating Agreement.

Assets listed on lines 113-117 of the 2011 report were all funds held in Kelley Dyer 401(k) plan at Fidelity, and they were all rolled into IRA at Charles Schwab on December 4, 2012. See lines 68-72. No reportable gain.

## FINANCIAL DISCLOSURE REPORT

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### IX. CERTIFICATION.

I certify that all information given above (including information pertaining to my spouse and minor or dependent children, if any) is accurate, true, and complete to the best of my knowledge and belief, and that any information not reported was withheld because it met applicable statutory provisions permitting non-disclosure.

I further certify that earned income from outside employment and honoraria and the acceptance of gifts which have been reported are in compliance with the provisions of 5 U.S.C. app. § 501 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ Amy B. Jackson

NOTE: ANY INDIVIDUAL WHO KNOWINGLY AND WILLFULLY FALSIFIES OR FAILS TO FILE THIS REPORT MAY BE SUBJECT TO CIVIL AND CRIMINAL SANCTIONS (5 U.S.C. app. § 104)

Committee on Financial Disclosure  
Administrative Office of the United States Courts  
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Washington, D.C. 20544