AO 10
Rev. 1/2022

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2021

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

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Burgess, Timothy M.	U.S. District Court, Anchorage, AK	8/10/2022
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. District Judge, Senior	**5a. Report Type (check appropriate type)** ☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	**6. Reporting Period** 01/01/2021 **to** 12/31/2021
7. Chambers or Office Address U.S. District Court 222 W. 7th Ave. Box 33 Anchorage, AK 99513		

IMPORTANT NOTES: ***The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.***

I. POSITIONS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 345 Trustees, Executors, Administrators, and Custodians; § 350 Power of Attorney; § 355 Outside Positions.)*

☐ NONE *(No reportable positions.)*

	POSITION	NAME OF ORGANIZATION/ENTITY
1.	Co-Trustee	Trust #1
2.	Co-Trustee	Trust #2
3.	Co-Trustee	Trust #3
4.	Co-Trustee	Trust #5
5.		

II. AGREEMENTS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 340 Agreements and Arrangements)*

☑ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.		
2.		
3.		

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 320 Income; § 360 Spouses and Dependent Children.)*

A. Filer's Non-Investment Income

☐ NONE *(No reportable non-investment income.)*

	DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1.	2021	State of Alaska: Alaska Permanent Fund Dividend	$1,114.00
2.			
3.			
4.			

B. Spouse's Non-Investment Income - *If you were married during any portion of the reporting year, complete this section.*

(Dollar amount not required except for honoraria.)

☐ NONE *(No reportable non-investment income.)*

	DATE	SOURCE
1.	2021	State of Alaska, Salary
2.	2021	State of Alaska, Alaska Permanent Fund Dividend
3.		
4.		

IV. REIMBURSEMENTS *-- transportation, lodging, food, entertainment.*

(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)

☑ NONE *(No reportable reimbursements.)*

	SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.					
2.					
3.					
4.					
5.					

V. GIFTS. *(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)*

☑ NONE *(No reportable gifts.)*

	SOURCE	DESCRIPTION	VALUE
1.			
2.			
3.			
4.			
5.			

VI. LIABILITIES. *(Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 335 Liabilities; § 360 Spouses and Dependent Children.)*

☐ NONE *(No reportable liabilities.)*

	CREDITOR	DESCRIPTION	VALUE CODE
1.	Bank of America	Credit Card	K
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Burgess, Timothy M.	8/10/2022

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(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)	
1. Wells Fargo Bank, Accounts	A	Int./Div.	O	T					
2. Credit Union 1, Accounts	A	Int./Div.	K	T					
3. Charles Schwab Bank Accounts	A	Interest	O	T					
4. Brokerage Account (H)									
5. -Vanguard Interm VWIUX	B	Dividend	M	T	Buy	04/09/21	K		
6.					Buy (add'l)	07/23/21	K		
7.					Buy (add'l)	08/19/21	K		
8.					Buy (add'l)	10/29/21	K		
9. -Vanguard Ltd Term VMLUX	B	Dividend	N	T	Buy	04/09/21	L		
10.					Buy (add'l)	07/23/21	L		
11.					Buy (add'l)	08/19/21	K		
12.					Buy (add'l)	10/29/21	L		
13. -Vanguard Short Term VWSUX	A	Dividend	N	T	Buy	04/09/21	L		
14.					Buy (add'l)	07/23/21	L		
15.					Buy (add'l)	08/19/21	K		
16.					Buy (add'l)	10/29/21	L		
17. -DFA Emerging Markets Cor DFCEX	A	Dividend	K	T	Buy	04/09/21	J		

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $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 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3 Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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☐ NONE *(No reportable income, assets, or transactions.)*

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18.					Buy (add'l)	07/23/21	J		
19.					Buy (add'l)	08/19/21	J		
20.					Buy (add'l)	10/29/21	J		
21. -DFA Global Real Estate DFGEX	A	Dividend	K	T	Buy	04/09/21	J		
22.					Buy (add'l)	07/23/21	J		
23.					Buy (add'l)	08/19/21	J		
24.					Buy (add'l)	10/29/21	J		
25. -DFA International Small Cap DISVX	B	Dividend	K	T	Buy	04/09/21	J		
26.					Buy (add'l)	07/23/21	J		
27.					Buy (add'l)	08/19/21	J		
28.					Buy (add'l)	10/29/21	J		
29. -DFA International Small Co DFISX	B	Dividend	K	T	Buy	04/02/21	J		
30.					Buy (add'l)	07/23/21	J		
31.					Buy (add'l)	08/19/21	J		
32.					Buy (add'l)	10/29/21	J		
33. - Dimensional US Core DFAC FKA DFA T.A. US Core DFTCX	B	Dividend	M	T	Buy	04/09/21	K		
34.					Buy (add'l)	07/23/21	K		

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35.					Buy (add'l)	08/19/21	K		
36.					Buy (add'l)	10/29/21	K		
37. -Dimensional Wld Ex DFAX FKA DFA TA World Ex US Core DFTWX	C	Dividend	M	T	Buy	04/09/21	L		
38.					Buy (add'l)	07/23/21	L		
39.					Buy (add'l)	08/19/21	K		
40.					Buy (add'l)	10/29/21	K		
41. - Dimensional Interntl DFIV FKA DFA Tax Managed Int'l DTMIX	B	Dividend	L	T	Buy	04/09/21	K		
42.					Buy (add'l)	07/23/21	K		
43.					Buy (add'l)	08/19/21	J		
44.					Buy (add'l)	10/29/21	J		
45. -DFA Tax Managed US Market DFMVX stock merger DFA Tax Managed US DTMMX	A	Dividend	L	T	Buy	04/09/21	J		
46.					Buy (add'l)	07/23/21	K		
47.					Buy (add'l)	08/19/21	J		
48.					Buy (add'l)	10/29/21	J		
49. -Dimensional US Small Cap DFAS FKA DFA Tax Managed US Small Cap DFTSX	A	Dividend	K	T	Buy	04/09/21	J		
50.					Buy (add'l)	07/23/21	K		

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51.					Buy (add'l)	08/19/21	J		
52.					Buy (add'l)	10/29/21	J		
53. -Dimensional US Targeted DFAT FKA DFA Tax Managed US Target DTMVX	A	Dividend	K	T	Buy	04/09/21	J		
54.					Buy (add'l)	07/23/21	K		
55.					Buy (add'l)	08/19/21	J		
56.					Buy (add'l)	10/29/21	J		
57. -Ford Motor Corp F (X)	A	Dividend	J	T					
58. -Halliburton HAL(X)	A	Dividend	J	T					
59. -JP Morgan JPM(X)	A	Dividend	J	T					
60. IRA #1 (H)									
61. -FA STGC Div & Inc FCSDX		None			Sold	02/18/21	J	A	
62. -Fidelity Adv Biotechnology FBTCX		None			Sold	02/18/21	J	A	
63. -Fidelity Adv Int'l Capital App FCPCX		None			Buy (add'l)	02/18/21	J		
64.					Sold	10/15/21	L	A	
65. -Fidelity Adv New Insights FNICX		None			Sold	02/18/21	J	A	
66. -Fidelity Adv Semiconductors FELCX		None			Sold	02/18/21	J	A	
67. -Fidelity Adv Strategic Income FSRCX	B	Dividend			Sold	10/15/21	K	A	

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A Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B Income during reporting period (1) Amount Code 1 (A-H)	B (2) Type (e g , div , rent, or int)	C Gross value at end of reporting period (1) Value Code 2 (J-P)	C (2) Value Method Code 3 (Q-W)	D Transactions during reporting period (1) Type (e g , buy, sell, redemption)	D (2) Date mm/dd/yy	D (3) Value Code 2 (J-P)	D (4) Gain Code 1 (A-H)	
68. -Fidelity Adv Industrials FCLCX		None			Buy	02/18/21	K		
69.					Sold	10/15/21	K	A	
70. -Fidelity Adv Health Care CL C FHCCX		None			Buy	02/18/21	K		
71.					Sold	10/15/21	K	A	
72. -Fidelity Adv Growth Opport CL C FACGX		None			Buy	02/18/21	L		
73.					Sold	10/15/21	L	A	
74. IRA #2 (H)									
75. -FRK Biotechnology Dis Fund FBDIX		None			Sold	03/15/21	J	A	
76. -FRK Mutl Gbl Discovery Fd Cl A TEDIX (X)		None			Sold	03/15/21	J	A	
77. -Franklin Rising Dividends Fund - Class FRDPX (X)		None			Sold	02/15/21	J	A	
78. IRA #3 (H)									
79. -Franklin Growth Fund FKGRX		None			Sold	10/15/21	J	A	
80. IRA #4 (H)									
81. -American Funds Fundamental Investors ANCFX		None			Sold	02/11/21	L	A	
82. -American Funds New Perspective Fund ANWPX		None			Sold	02/11/21	M	A	
83. IRA #5 (H)									
84. -Putnam Global Health Care PHSTX		None			Sold	03/15/21	J	A	

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85. -Putnam Focused Equity Fund Class A PGIAX (X)		None			Sold	03/15/21	J	A	
86. -Putnam Research Fund Class A PNRAX (X)		None			Sold	03/15/21	J	A	
87. ROTH IRA #6 (H)									
88. -Franklin Growth Fund - Class C FRGSX		None			Buy	3/15/21	J		
89.					Sold	10/01/21	J	A	
90. -DFA Five-Year Global FIX DFGBX	A	Dividend	J	T	Buy	10/01/21	J		
91. -DFA One-Year Fixed Income DFIHX	A	Dividend	J	T	Buy	10/01/21	J		
92. -DFA Selectively Hedged DFSHX	A	Dividend	J	T	Buy	10/01/21	J		
93. -DFA Short-Duration Real DFAIX	A	Dividend	J	T	Buy	10/01/21	J		
94. -DFA Short-Term Extended DFEQX	A	Dividend	J	T	Buy	10/01/21	J		
95. -DFA International Core DFIEX	A	Dividend	J	T	Buy	10/01/21	J		
96. -DFA US Core Equity DFQTX	A	Dividend	J	T	Buy	10/01/21	J		
97. IRA #7 (H) Consolidated									
98. -DFA Five-Year Global FIX DFGBX	A	Dividend	K	T	Buy	10/15/21	K		
99. -DFA One-Year Fixed Income DFIHX	A	Dividend	K	T	Buy	10/15/21	K		
100. -DFA Selectively Hedged DFSHX	A	Dividend	K	T	Buy	10/15/21	K		
101. -DFA Short-Duration Real DFAIX	A	Dividend	K	T	Buy	10/15/21	K		

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102. -DFA Short-Term Extended DFEQX	A	Dividend	K	T	Buy	10/15/21	K		
103. -DFA Emerging Markets Core DFCEX	A	Dividend	J	T	Buy	10/15/21	J		
104. -DFA Global Real Estates DFGEX	A	Dividend	J	T	Buy	10/15/21	J		
105. -DFA International Core DFIEX	A	Dividend	K	T	Buy	10/15/21	K		
106. -DFA International Small Cap DISVX	A	Dividend	J	T	Buy	10/15/21	J		
107. -DFA International Small DFISX	A	Dividend	J	T	Buy	10/15/21	J		
108. -DFA International Value DFIVX	A	Dividend	K	T	Buy	10/15/21	K		
109. -DFA US Core Equity DFQTX	A	Dividend	K	T	Buy	10/15/21	K		
110. -DFA US Large Cap DFLVX	A	Dividend	K	T	Buy	10/15/21	K		
111. -DFA US Small Cap DFSTX	A	Dividend	J	T	Buy	10/15/21	J		
112. -DFA US Small Cap Value DFSVX	A	Dividend	J	T	Buy	10/15/21	J		
113. Jackson National Life Variable Annuity (H)									
114. -1 yr Guaranteed Account		None			Sold	02/24/21	K	A	
115. -JNL/American New World		None			Sold	02/24/21	J	A	
116. -JNL/Loomis Sayles Global Growth		None			Sold	02/24/21	J	A	
117. -JNL/Mellon Dow Index		None			Sold	02/24/21	J	A	
118. -JNL/Mellon Healthcare Sector		None			Sold	02/24/21	J	A	

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $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 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3 Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

Name of Person Reporting	Date of Report
Burgess, Timothy M.	8/10/2022

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(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)	
119. -JNL/PPM Amercia High Yield Bond		None			Sold	02/24/21	K	A	
120. -JNL/T Rowe Price Value		None			Sold	02/24/21	J	A	
121. Lincoln Financial NQ Annuity (H)									
122. -Am CT Lrg CoValu		None	J	T	Buy	02/25/21	J		
123. -AF Flbl Growth		None	J	T	Buy	02/25/21	J		
124. -LA Devlp Growth		None	J	T	Buy	02/25/21	J		
125. -LVIP TRP Growth		None	J	T	Buy	02/25/21	J		
126. -LVIP VG Dom Eq		None	J	T	Buy	02/25/21	J		
127. -LVIP Vg Int Eq		None	J	T	Buy	02/25/21	J		
128. -Vlgtn MidValue		None	J	T	Buy	02/25/21	J		
129.					Sold (part)	07/31/21	J	A	
130. Trust #1 (H)									
131. -Pioneer High Yield Fund A	B	Dividend			Sold	07/08/21	L	D	
132. -Pioneer Global High Yield Fund A	B	Dividend			Sold	07/08/21	K	C	
133. Trust #2 (H)									
134. -Rental Property, San Mateo County, CA		None			Sold	01/05/21	O	E	Jianhong Fang, Jina Lin
135. -Rental Property, Santa Clara County, CA	A	Rent			Sold	08/05/21	P1	G	Anvi Niraj Patel

1 Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2 Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $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 - $25,000,000	
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Name of Person Reporting	Date of Report
Burgess, Timothy M.	8/10/2022

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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

A	B		C		D				
Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(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)	
136. -Wells Fargo Bank Accounts	A	Interest	M	T					
137. Trust #3(H)									
138. -Rental Property, Santa Clara County, CA		None			Sold	05/17/21	O	A	Biraja Devulapalli, Enjeti
139.									

1 Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2 Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $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 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

3 Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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Burgess, Timothy M.	8/10/2022

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

Assets that include an "X" denotes items that were under the reporting requirement for 2020 and now exceed the threshold

Trust 4 was liquidated in 2020.

Trust 1 Wells Fargo account closed in 2020.

Trust 3 Wells Fargo account closed in 2020.

Trust 5 is a revocable trust opened in 2021.

Name of Person Reporting	Date of Report
Burgess, Timothy M.	8/10/2022

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/ Timothy M. Burgess

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