AO 10 Rev. 1/2008

FINANCIAL DISCLOSURE REPORT
FOR CALENDAR YEAR 2008

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
Fogel, Jeremy D.	N. D. California	05/07/2009
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)	**5a. Report Type** (check appropriate type)	**6. Reporting Period**
U. S. District Judge - active	☐ Nomination, Date ☐ Initial ☑ Annual ☐ Final 5b. ☐ Amended Report	01/01/2008 to 12/31/2008
7. Chambers or Office Address	**8. On the basis of the information contained in this Report and any modifications pertaining thereto, it is, in my opinion, in compliance with applicable laws and regulations.**	
United States Courthouse 280 South First Street San Jose, California 95113	Reviewing Officer________ Date______	

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. Sign on last page.*

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

☐ NONE *(No reportable positions.)*

POSITION	NAME OF ORGANIZATION/ENTITY
1. Lecturer in law	Stanford Law School
2. Trustee	Trust #1 (see Part VIII)
3.	
4.	
5.	

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

☐ NONE *(No reportable agreements.)*

DATE	PARTIES AND TERMS
1. 9/30/81	California Judicial Retirement System: entitled to approximately 61% of then-current salary of Superior Court Judge as of my 63rd birthday
2.	
3.	

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see pp. 17-24 of filing instructions.)*

A. Filer's Non-Investment Income

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

DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1. 2008	Stanford Law School (teaching)	$10350
2.		
3.		
4.		

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

(Dollar amount not required except for honoraria.)

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

DATE	SOURCE AND TYPE
1. 2008	Los Gatos-Saratoga Joint Union High School District
2.	
3.	
4.	

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

(Includes those to spouse and dependent children; see pp. 25-27 of filing instructions.)

☐ NONE *(No reportable reimbursements.)*

SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1. Fordham Law School	3/6/2008-3/7/2008	New York, NY	Speak at conference	Transportation, meals and lodging
2. Los Angeles Intellectual Prope rty Law Assosciation	3/17/2008-3/19/2008	Beverly Hills, CA	Speak at conference	Transportation, meals and lodging
3. Intellectual Property Owners A ssociation	6/9/2008-6/10/2008	Washington, DC	Speak at conference	Transportation, meals and lodging
4. Federal Circuit Bar Associatio n	6/25/2008-6/26/2008	Monterey, CA	Speak at conference	Transportation, meals and lodging
5.				

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Fogel, Jeremy D.	05/07/2009

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

☑ NONE *(No reportable gifts.)*

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

VI. LIABILITIES. *(Includes those of spouse and dependent children; see pp. 32-33 of filing instructions.)*

☑ NONE *(No reportable liabilities.)*

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

Name of Person Reporting	Date of Report
Fogel, Jeremy D.	05/07/2009

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 (1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	(2) Date Month - Day	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
1. First Western Investments (assets below) (See Part VIII)					Redeemed (part)	3/5	K		
2.					Redeemed (part)	9/30	K		
3.					Redeemed (part)	12/29	K		
4. --Russell Equity I	A	Distribution	J	T					
5. --Russell Tax-Managed Lg Cap Fund	A	Dividend	K	T					
6. --Russell International Cl I	A	Distribution	K	T					
7. --Russell Emerging Markets	A	Distribution	J	T					
8. --Russell Tax Exempt Bond	C	Int./Div.	L	T					
9. --Fidelity Cash	A	Int./Div.	J	T					
10. --Russell Tax-Mgd Mid & Sm Cap Fund	C	Distribution	K	T					
11. Morgan Stanley Dean Witter IRA #1 (assets below)									
12. --MSDW Liquid Asset Fund	A	Int./Div.	J	T					
13. --Pioneer Mid-Cap Fund	A	Dividend	K	T					
14. --Morgan Stanley Bank	A	Interest	K	T					
15. --John Hancock Regional Bank B	A	Interest	J	T					
16. --Unit Van Kampen EAFE Select 20 Portfolio 2007-1	A	Int./Div.	K	T					
17. Morgan Stanley Dean Witter IRA #2 (assets below)									

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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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)	B. Income during reporting period		C. Gross value at end of reporting period		D. 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 Month - Day	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
18. --MSDW Liquid Asset Fund	A	Int./Div.	J	T					
19. --Morgan Stanley Bank	A	Interest	J	T					
20. --MSDW Global Advantage B	A	Dividend	J	T					
21. --Pioneer Mid-Cap Fund	A	Dividend	K	T					
22. --John Hancock Regional Bank A	A	Interest	J	T					
23. --MS Spectrum Tech	A	Dividend	J	T					
24. --MS Spectrum Select	A	Dividend	J	T					
25. MSDW Stock Fund (assets below)									
26. --MSIF US Real Estate Port A	A	Distribution	J	T					
27. --MSIF Tr US Small Cap Val Instr	A	Distribution	K	T					
28. --MSDW Active Assets	A	Interest	J	T					
29. --International Value Equity Fund	A	Distribution	J	T					
30. --Mid-Cap Value Fund D	A	Distribution	K	T					
31. --MSIF Fixed Income Port Inst	A	Dividend	K	T					
32. --MSIF Tr Ltd Duration Inst	A	Dividend	K	T					
33. --MSIF Emerging Markets	A	Distribution	J	T					
34. --Morgan Stanley Bank	A	Interest	J	T					

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less F =$50,001 - $100,000	B =$1,001 - $2,500 G =$100,001 - $1,000,000	C =$2,501 - $5,000 H1 =$1,000,001 - $5,000,000	D =$5,001 - $15,000 H2 =More than $5,000,000	E =$15,001 - $50,000
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less N =$250,001 - $500,000 P3 =$25,000,001 - $50,000,000	K =$15,001 - $50,000 O =$500,001 - $1,000,000	L =$50,001 - $100,000 P1 =$1,000,001 - $5,000,000 P4 =More than $50,000,000	M =$100,001 - $250,000 P2 =$5,000,001 - $25,000,000	
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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets)	B. Income during reporting period		C. Gross value at end of reporting period		D. 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 Month - Day	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
35. Wachovia Stock Fund (assets below)									
36. --Blackrock Europe Fund	A	Distribution	J	T					
37. --S&P Mid-Cap	A	Dividend	J	T					
38. --Nasdaq 100 SHS	A	Dividend	J	T					
39. --Spdr Tr United Ser 1	A	Dividend	K	T					
40. --DWS Emerging Mkts Equity	A	Distribution	J	T					
41. World Savings IRA (CD)	A	Interest	J	T					
42. World Savings IRA (CD)	A	Interest	J	T					
43. Trust #1 (assets below) (X) (see Part VIII)									
44. --City National Bank Ladder Account	C	Interest	P1	T	Open	9/25	P1		
45. Nortel Networks, Inc. common stock		None	K	T					
46. LTCQ, Inc. common stock		None	K	U					

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

The asset identified as Trust #1in Parts I and VII is an irrevocable trust that was established by [redacted] in 1990. Until September 2008, the only asset of the trust was an insurance policy on the life of [redacted] In September 2008, [redacted] elected to sell the insurance policy for cash, and the proceeds were placed in the bank account identified on line 44 of Part VII. Prior to the sale of the insurance policy, I had no control over or entitlement to the trust assets. As a result of the sale and in my capacity as trustee, I now have control over the manner in which the assets are invested, but I continue to derive no benefit from the assets themselves, which are held for the benefit of .

The asset identified as First Western Investments in Part VII is identified in previous reports as Reber/Russell Stock Fund. The name change is a result of the investment manager merging his operations with First Western.

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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.

Signat[redacted]

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

FILING INSTRUCTIONS

Mail signed original and 3 additional copies to:

Committee on Financial Disclosure
Administrative Office of the United States Courts
Suite 2-301
One Columbus Circle, N.E.
Washington, D.C. 20544