

# FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2011

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)<br><br>Wheeler, Thomas C.                                                                                                                                          | <b>2. Court or Organization</b><br><br>U.S. Court of Federal Claims                                                                                                                                                                                                                                 | <b>3. Date of Report</b><br><br>08/22/2012                       |
| <b>4. Title</b> (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)<br><br>Active                                                                                               | <b>5a. Report Type</b> (check appropriate type)<br><input type="checkbox"/> Nomination <input type="checkbox"/> Date<br><input type="checkbox"/> Initial <input checked="" type="checkbox"/> Annual <input type="checkbox"/> Final<br><b>5b.</b> <input checked="" type="checkbox"/> Amended Report | <b>6. Reporting Period</b><br><br>01/01/2011<br>to<br>12/31/2011 |
| <b>7. Chambers or Office Address</b><br><br>U.S. Court of Federal Claims<br>717 Madison Place, N.W.<br>Washington, DC 20005                                                                                                      |                                                                                                                                                                                                                                                                                                     |                                                                  |
| <p><b>IMPORTANT NOTES:</b> The instructions accompanying this form must be followed. Complete all parts, checking the <b>NONE</b> box for each part where you have no reportable information. Insert signature on last page.</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. 2006 | DLA Piper Retirement Trust Plan with former law firm, no control. |
| 2.      |                                                                   |
| 3.      |                                                                   |

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Name of Person Reporting

Wheeler, Thomas C.

Date of Report

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

| <u>DATE</u> | <u>SOURCE AND TYPE</u>              | <u>INCOME</u><br>(yours, not spouse's) |
|-------------|-------------------------------------|----------------------------------------|
| 1. 2011     | DLA Piper Law Firm Retirement Plan. | \$7,588.56                             |
| 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. 2011     | Montgomery County Public Schools, Salary. |
| 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.            |              |                 |                |                               |

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

1.

2.

3.

4.

5.

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

1.

2.

3.

4.

5.

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Name of Person Reporting

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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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 1. SIT Tax Exempt Bond Mutual Fund                                                                                          | B                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 2. Bank of America Checking Account                                                                                         | A                                       | Interest                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 3. Potomac Cliffs at Watson House RE P-ship<br>(See Part VIII)                                                              |                                         | None                                          | K                                               | R                                         |                                                 |                         |                                 |                                |                                                                   |
| 4. [REDACTED] Second-to-Die Life Insurance<br>Policy                                                                        |                                         | None                                          | N                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 5. [REDACTED] Whole Life Policy                                                                                             |                                         | None                                          | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 6. Broker Account #1 – [REDACTED] Rev. Trust                                                                                |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 7. - Daimler AG Common Stock                                                                                                | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 8. - Air Castle Common Stock                                                                                                | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 9. - Altria Group Common Stock                                                                                              | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 10. - American Express Common Stock                                                                                         | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 11. - BP PLC Common Stock                                                                                                   | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 12. - Walt Disney Common Stock                                                                                              | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 13. - Healthcare Realty Trust Common Stock                                                                                  | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 14. - Hewlett Packard Common Stock                                                                                          | B                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 15. - Motorola Common Stock                                                                                                 | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 16. - Philip Morris Int'l Common Stock                                                                                      | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 17. - Prudential Financial Common Stock                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                                                    |                                                      |                                                                                        |                                                            |                        |
|--------------------------------------------------|------------------------------------------------------------------------------------|------------------------------------------------------|----------------------------------------------------------------------------------------|------------------------------------------------------------|------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A –\$1,000 or less<br>F –\$50,001 - \$100,000                                      | B –\$1,001 - \$2,500<br>G –\$100,001 - \$1,000,000   | C –\$2,501 - \$5,000<br>H1 –\$1,000,001 - \$5,000,000                                  | D –\$5,001 - \$15,000<br>H2 –More than \$5,000,000         | E –\$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J –\$15,000 or less<br>N –\$250,001 - \$500,000<br>P3 –\$250,000.01 - \$50,000,000 | K –\$15,001 - \$50,000<br>O –\$500,001 - \$1,000,000 | L –\$50,001 - \$100,000<br>P1 –\$1,000,001 - \$5,000,000<br>P4 –More than \$50,000,000 | M –\$100,001 - \$250,000<br>P2 –\$5,000,001 - \$25,000,000 |                        |
| 3. Value Method Codes<br>(See Column C2)         | Q –Appraisal<br>U –Book Value                                                      | R –Cost (Real Estate Only)<br>V –Other               | S –Assessment<br>W –Estimated                                                          | T –Cash Market                                             |                        |

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Name of Person Reporting

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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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                               |   |          |   |   |             |          |   |   |  |
|-----------------------------------------------|---|----------|---|---|-------------|----------|---|---|--|
| 18. - Nuveen Municipal Mkt. Opportunity Fund  | B | Dividend | K | T |             |          |   |   |  |
| 19. - Legg Mason Value Trust Fund             | A | Dividend |   |   | Sold        | 12/19/11 | K | A |  |
| 20. Broker Account #2 -- IRA                  |   |          |   |   |             |          |   |   |  |
| 21. - Citigroup Common Stock                  |   | None     | J | T |             |          |   |   |  |
| 22. - Legg Mason Clearbridge Fund. Value Fund |   | None     | J | T |             |          |   |   |  |
| 23. Broker Account #3 -- IRA Rollover         |   |          |   |   |             |          |   |   |  |
| 24. - Air Castle Common Stock                 | A | Dividend | J | T |             |          |   |   |  |
| 25. - Covidien PLC Common Stock               | A | Dividend | K | T | Buy (add'l) | 09/06/11 | J |   |  |
| 26. - Covidien PLC Common Stock               | A | Dividend | K | T | Buy (add'l) | 10/24/11 | K |   |  |
| 27. - Tyco Electronics Common Stock           | A | Dividend | J | T |             |          |   |   |  |
| 28. - Altria Group Common Stock               | B | Dividend | K | T |             |          |   |   |  |
| 29. - Apollo Investment Common Stock          | B | Dividend | J | T |             |          |   |   |  |
| 30. - BP PLC Common Stock                     | B | Dividend | K | T |             |          |   |   |  |
| 31. - Bristol Myers Squibb Common Stock       | B | Dividend | K | T |             |          |   |   |  |
| 32. - Cisco Systems Common Stock              | A | Dividend | K | T | Buy (add'l) | 03/28/11 | J |   |  |
| 33. - Comcast Common Stock                    | B | Dividend | K | T |             |          |   |   |  |
| 34. - Constellation Brands Common Stock       |   | None     | K | T |             |          |   |   |  |

|                                                  |                                                                                       |                                                        |                                                                                           |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                   | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$50,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                           | T = Cash Market                                              |                         |

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|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                                    |   |          |   |   |                |          |   |   |  |
|----------------------------------------------------|---|----------|---|---|----------------|----------|---|---|--|
| 35. - Walt Disney Common Stock                     | A | Dividend | K | T | Buy<br>(add'l) | 09/02/11 | J |   |  |
| 36. - Emerson Electric Common Stock                | A | Dividend | K | T |                |          |   |   |  |
| 37. - Energy Transfer Partners LP                  | D | Dividend | L | T |                |          |   |   |  |
| 38. - General Electric Common Stock                | A | Dividend | K | T |                |          |   |   |  |
| 39. - Halliburton Common Stock                     | A | Dividend | K | T | Buy<br>(add'l) | 10/25/11 | K |   |  |
| 40. - Hewlett Packard Common Stock                 | A | Dividend | K | T | Buy<br>(add'l) | 02/23/11 | J |   |  |
| 41. - Home Depot Common Stock                      | B | Dividend | K | T | Buy<br>(add'l) | 09/02/11 | J |   |  |
| 42. - Hospitality Properties Trust Common<br>Stock | B | Dividend | K | T | Buy<br>(add'l) | 06/15/11 | J |   |  |
| 43. - J.P. Morgan Chase Common Stock               | B | Dividend | K | T |                |          |   |   |  |
| 44. - Kroger Common Stock                          | A | Dividend | J | T |                |          |   |   |  |
| 45. - Marriott Int'l Common Stock                  | A | Dividend | K | T |                |          |   |   |  |
| 46. - McDonald's Common Stock                      | B | Dividend |   |   | Sold           | 08/29/11 | K | A |  |
| 47. - Microsoft Common Stock                       | A | Dividend | K | T |                |          |   |   |  |
| 48. - Motorola Common Stock                        | A | Dividend |   |   | Sold           | 04/21/11 | J | A |  |
| 49. - Nike Common Stock                            | B | Dividend |   |   | Sold           | 07/15/11 | L | F |  |
| 50. - Pepsico Common Stock                         | B | Dividend | L | T | Buy            | 07/21/11 | L |   |  |
| 51. - Philip Morris Int'l Common Stock             | B | Dividend | K | T |                |          |   |   |  |

|                                                  |                                                                                       |                                                        |                                                                                          |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                  | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$5,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                          | T = Cash Market                                              |                         |

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

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

| A.<br>Description of Assets<br>(including trust assets)<br><br>Place "X" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|---------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                           | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 52. - Sandridge Permian Trust                                                                                             | D                                       | Dividend                                      | K                                               | T                                         | Buy                                             | 08/15/11                | K                               |                                |                                                                   |
| 53. - Sandridge Permian Trust                                                                                             | D                                       | Dividend                                      | K                                               | T                                         | Buy<br>(add'l)                                  | 08/31/11                | K                               |                                |                                                                   |
| 54. - Southwest Airlines Common Stock                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 55. - 3M Common Stock                                                                                                     | B                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 56. - United Parcel Service Common Stock                                                                                  | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 57. - United States Steel Common Stock                                                                                    | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 58. - Verizon Common Stock                                                                                                | B                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 59. - Walmart Common Stock                                                                                                | B                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 60. - Cohen & Steers Infrastructure Fund                                                                                  | B                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 61. - Kayne Anderson Energy Return Fund                                                                                   | C                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 62. - New Germany Fund                                                                                                    | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 63. - Eaton Vance LTD Duration Income Fund                                                                                | B                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 64. Brker Acct #4 -- SSB Asset Man Fd<br>Rev Trst (See Pt VIII)                                                           |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 65. - Citibank Money Market (X)                                                                                           | A                                       | Interest                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 66. - AMC Networks Common Stock (X)                                                                                       |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 67. - AT&T Inc. Common Stock (X)                                                                                          | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 68. - Akamai Technologies Common Stock (X)                                                                                |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                   |                                                        |                                                            |                                                              |                             |
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| A.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                                      |   |          |   |   |  |  |  |  |  |
|------------------------------------------------------|---|----------|---|---|--|--|--|--|--|
| 69. - Amazon.com Common Stock (X)                    |   | None     | J | T |  |  |  |  |  |
| 70. - Amgen, Inc. Common Stock (X)                   | A | Dividend | J | T |  |  |  |  |  |
| 71. - Anadarko Petroleum Common Stock (X)            | A | Dividend | J | T |  |  |  |  |  |
| 72. - Anheuser Busch InBev SA Spon. Common Stock (X) | A | Dividend | J | T |  |  |  |  |  |
| 73. - Apache Corp. Common Stock (X)                  | A | Dividend | J | T |  |  |  |  |  |
| 74. - Apple, Inc. Common Stock (X)                   |   | None     | J | T |  |  |  |  |  |
| 75. - Applied Materials, Inc. Common Stock (X)       | A | Dividend | J | T |  |  |  |  |  |
| 76. - Autodesk, Inc. Delaware Common Stock (X)       |   | None     | J | T |  |  |  |  |  |
| 77. - Baker Hughes, Inc. Common Stock (X)            | A | Dividend | J | T |  |  |  |  |  |
| 78. - Bed Bath & Beyond Common Stock (X)             |   | None     | J | T |  |  |  |  |  |
| 79. - BHP Billiton Ltd. Common Stock (X)             | A | Dividend | J | T |  |  |  |  |  |
| 80. - Biogen Idec Inc. Common Stock (X)              |   | None     | J | T |  |  |  |  |  |
| 81. - Blackrock, Inc. Common Stock (X)               | A | Dividend | J | T |  |  |  |  |  |
| 82. - Boeing Co. Common Stock (X)                    | A | Dividend | J | T |  |  |  |  |  |
| 83. - Broadcom Corp. Common Stock (X)                | A | Dividend | J | T |  |  |  |  |  |
| 84. - CME Group, Inc. Common Stock (X)               | A | Dividend | J | T |  |  |  |  |  |
| 85. - CVS Caremark Corp. Common Stock (X)            | A | Dividend | J | T |  |  |  |  |  |

|                                                  |                                                                                       |                                                        |                                                                                          |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                  | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$5,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                          | T = Cash Market                                              |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

Date of Report

08/22/2012

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                                       |   |          |   |   |  |  |  |  |  |
|-------------------------------------------------------|---|----------|---|---|--|--|--|--|--|
| 86. - Cablevision Systems Corp. Common Stock (X)      | A | Dividend | J | T |  |  |  |  |  |
| 87. - Cameron Intl. Corp. Common Stock (X)            |   | None     | J | T |  |  |  |  |  |
| 88. - Carnival CP New Paired Common Stock (X)         | A | Dividend | J | T |  |  |  |  |  |
| 89. - Celgene Corp. Common Stock (X)                  |   | None     | J | T |  |  |  |  |  |
| 90. - Chubb Corp. Common Stock (X)                    | A | Dividend | J | T |  |  |  |  |  |
| 91. - Cisco Systems Inc. Common Stock (X)             | A | Dividend | J | T |  |  |  |  |  |
| 92. - Citrix Systems, Inc. Common Stock (X)           |   | None     | J | T |  |  |  |  |  |
| 93. - Coca Cola Inc. Common Stock (X)                 | A | Dividend | J | T |  |  |  |  |  |
| 94. - Comcast Corp. CL A Special New Common Stock (X) | A | Dividend | J | T |  |  |  |  |  |
| 95. - Conoco Phillips Common Stock (X)                | A | Dividend | J | T |  |  |  |  |  |
| 96. - Cree Research Inc. Common Stock (X)             |   | None     | J | T |  |  |  |  |  |
| 97. - Deere & Co. Common Stock (X)                    | A | Dividend | J | T |  |  |  |  |  |
| 98. - Devon Energy Corp. New Common Stock (X)         | A | Dividend | J | T |  |  |  |  |  |
| 99. - Walt Disney Co. Holding Common Stock (X)        | A | Dividend | J | T |  |  |  |  |  |
| 100. - The DirecTV Group CL A Common Stock (X)        |   | None     | J | T |  |  |  |  |  |
| 101. - Dolby CL A Common Stock (X)                    |   | None     | J | T |  |  |  |  |  |
| 102. - Dover Corp. Common Stock (X)                   | A | Dividend | J | T |  |  |  |  |  |

|                                                  |                                                                                       |                                                        |                                                                                           |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                   | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$50,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                           | T = Cash Market                                              |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

Date of Report

08/22/2012

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 103. - EMC Corp. Mass. Common Stock (X)                                                                                     |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 104. - Eaton Corp. Common Stock (X)                                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 105. - eBay Inc. Common Stock (X)                                                                                           |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 106. - Emerson Electric Common Stock (X)                                                                                    | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 107. - Ericsson LM Tel. ADR CL B New<br>Common Stock (X)                                                                    | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 108. - Fluor Corp. New Common Stock (X)                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 109. - Forest Laboratories Inc. Common Stock<br>(X)                                                                         |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 110. - Franklin Resources Inc. Common Stock<br>(X)                                                                          | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 111. - GAP, Inc. Common Stock (X)                                                                                           | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 112. - General Electric Co. Common Stock (X)                                                                                | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 113. - GlaxoSmithKline PLC ADS Common<br>Stock (X)                                                                          | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 114. - Google Inc. Common Stock (X)                                                                                         |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 115. - Halliburton Co. Common Stock (X)                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 116. - Hess Corp. Common Stock (X)                                                                                          | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 117. - Home Depot Inc. Common Stock (X)                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 118. - Honeywell Intl. Inc. Common Stock (X)                                                                                | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 119. - Intuit Inc. Common Stock (X)                                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                           |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                   | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$50,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                           | T = Cash Market                                              |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

Date of Report

08/22/2012

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 120. - JP Morgan Chase & Co. Common Stock (X)                                                                               | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 121. - Johnson & Johnson Common Stock (X)                                                                                   | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 122. - Jones Lang LaSalle Inc. Common Stock (X)                                                                             | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 123. - Juniper Networks Common Stock (X)                                                                                    |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 124. - KLA Tencor Corp. Common Stock (X)                                                                                    | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 125. - Keycorp New Common Stock (X)                                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 126. - L-3 Communications Holding Inc. Common Stock (X)                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 127. - Liberty Media Co. Liberty Cap A Common Stock (X)                                                                     |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 128. - Liberty Interactive Co. Inter A Common Stock (X)                                                                     |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 129. - Mattel Inc. Common Stock (X)                                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 130. - Merck & Co. Inc. New Common Stock (X)                                                                                | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 131. - Microsoft Corp. Common Stock (X)                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 132. - Monsanto Co. New Common Stock (X)                                                                                    | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 133. - Morgan Stanley Common Stock (X)                                                                                      | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 134. - National Oilwell Varco Inc. Common Stock (X)                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 135. - Netapp, Inc. Common Stock (X)                                                                                        |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 136. - Nike Inc. B Common Stock (X)                                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                           |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                   | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$50,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                           | T = Cash Market                                              |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

Date of Report

08/22/2012

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

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| A.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 137. - Noble Energy Inc. Common Stock (X)                                                                                   | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 138. - Northrop Grumman Corp. Common Stock (X)                                                                              | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 139. - Novartis AG ADR Common Stock (X)                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 140. - Nucor Corp. Common Stock (X)                                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 141. - Oracle Corp. Common Stock (X)                                                                                        | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 142. - Oshkosh Corp. Common Stock (X)                                                                                       |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 143. - Pall Corp. Common Stock (X)                                                                                          | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 144. - Pebblebrook Hotel Tr. Com. Common Stock (X)                                                                          | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 145. - Pepsico Inc. Common Stock (X)                                                                                        | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 146. - Procter & Gamble Common Stock (X)                                                                                    | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 147. - Qualcom Inc. Common Stock (X)                                                                                        | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 148. - Safeway Inc. Com. New Common Stock (X)                                                                               | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 149. - Sandisk Corp. Common Stock (X)                                                                                       |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 150. - Schlumberger Ltd. Common Stock (X)                                                                                   | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 151. - Charles Schwab New Common Stock (X)                                                                                  | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 152. - Syntactic Corp. Common Stock (X)                                                                                     |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 153. - Texas Instruments Common Stock (X)                                                                                   | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                           |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                   | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$50,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                           | T = Cash Market                                              |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

Date of Report

08/22/2012

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 154. - Thermo Fisher Scientific Inc. Common Stock (X)                                                                       |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 155. - US Bancorp. Com New Common Stock (X)                                                                                 | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 156. - Unilever PLC (New) ADS Common Stock (X)                                                                              | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 157. - United Parcel Service Inc. CL B Common Stock (X)                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 158. - United States Steel Corp. New Common Stock (X)                                                                       | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 159. - United Health Group Inc. Common Stock (X)                                                                            | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 160. - Visa Inc. CL A Common Stock (X)                                                                                      | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 161. - Vodaphone Group PLC ADS New Common Stock (X)                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 162. - Weyerhaeuser Co. Common Stock (X)                                                                                    | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 163. - Covidien PLC New Common Stock (X)                                                                                    | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 164. - Seagate Technology PLC Common Stock (X)                                                                              | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 165. - Allied World Assurance Co. Hldgs Ltd. Common Stock (X)                                                               | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 166. - Weatherford International Ltd. Common Stock (X)                                                                      |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 167. - TE Connectivity Ltd. New Common Stock (X)                                                                            | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 168. - Tyco International Ltd. New Common Stock (X)                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 169. Brker Acct # 5 -- SSB Asset Man Fd, IRA (See Part VIII)                                                                |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 170. - MS Liquid Asset Fund Money Market (X)                                                                                |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                           |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                   | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$50,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                           | T = Cash Market                                              |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

Date of Report

08/22/2012

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 171. - AT&T Common Stock (X)                                                                                                | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 172. - Akamai Technologies Common Stock (X)                                                                                 |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 173. - Amazon.com Inc. Common Stock (X)                                                                                     |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 174. - Amgen, Inc. Common Stock (X)                                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 175. - Anadarko Petroleum Common Stock (X)                                                                                  | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 176. - Anheuser Busch InBev SA Spon. Common<br>Stock (X)                                                                    | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 177. - Apache Corp. Common Stock (X)                                                                                        | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 178. - Apple, Inc. Common Stock (X)                                                                                         |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 179. - Applied Materials, Inc. Common Stock (X)                                                                             | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 180. - Autodesk, Inc. Delaware Common Stock<br>(X)                                                                          |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 181. - Baker Hughes, Inc. Common Stock (X)                                                                                  | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 182. - Bed Bath & Beyond Common Stock (X)                                                                                   |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 183. - BHP Billiton Ltd. Common Stock (X)                                                                                   | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 184. - Biogen Idec Common Stock (X)                                                                                         |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 185. - Blackrock, Inc. Common Stock (X)                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 186. - Boeing Co. Common Stock (X)                                                                                          | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 187. - Broadcom Corp. CL A Common Stock (X)                                                                                 | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                          |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                  | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$5,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                          | T = Cash Market                                              |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

Date of Report

08/22/2012

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 188. - CME Group Inc. Common Stock (X)                                                                                      | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 189. - CVS Caremark Corp. Common Stock (X)                                                                                  | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 190. - Cablevision Systems Corp. Common Stock (X)                                                                           | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 191. - Cameron Intl Corp. Common Stock (X)                                                                                  |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 192. - Carnival CP New Paired Com Common Stock (X)                                                                          | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 193. - Celgene Corp. Common Stock (X)                                                                                       |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 194. - Chubb Corp. Common Stock (X)                                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 195. - Cisco Systems Inc. Common Stock (X)                                                                                  | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 196. - Citrix Systems Inc. Common Stock (X)                                                                                 |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 197. - Coca Cola Co. Common Stock (X)                                                                                       | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 198. - Comcast Corp. CL A Special New Common Stock (X)                                                                      | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 199. - Conoco Phillips Common Stock (X)                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 200. - Cree Research, Inc. Common Stock (X)                                                                                 |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 201. - Deere & Co. Common Stock (X)                                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 202. - Devon Energy Corp. New Common Stock (X)                                                                              | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 203. - Walt Disney Co. Holdings Common Stock (X)                                                                            | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 204. - The DirecTV Group CL A Common Stock (X)                                                                              |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                           |                                                              |                         |
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| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                   | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$50,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                           | T = Cash Market                                              |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

Date of Report

08/22/2012

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

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| A.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 205. - Dolby CL A Common Stock (X)                                                                                          |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 206. - Dover Corp. Common Stock (X)                                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 207. - EMC Corp. Mass Common Stock (X)                                                                                      |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 208. - EOG Resources, Inc. Common Stock (X)                                                                                 | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 209. - Eaton Corp. Common Stock (X)                                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 210. - eBay Inc. Common Stock (X)                                                                                           |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 211. - Emerson Electric Co. Common Stock (X)                                                                                | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 212. - Ericsson LM Tel. ADR CL B New<br>Common Stock (X)                                                                    | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 213. - Fluor Corp. New Common Stock (X)                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 214. - Forest Laboratories Inc. Common Stock<br>(X)                                                                         |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 215. - Franklin Resources, Inc. Common Stock<br>(X)                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 216. - Gap Inc.. Common Stock (X)                                                                                           | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 217. - General Electric Co. Common Stock (X)                                                                                | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 218. - GlaxoSmithKline PLC ADS Common<br>Stock (X)                                                                          | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 219. - Google Inc. CL A Common Stock (X)                                                                                    |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 220. - Halliburton Co. Common Stock (X)                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 221. - Hess Corp. Common Stock (X)                                                                                          | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                         |                                  |                             |                                |                                 |                         |
|-------------------------|----------------------------------|-----------------------------|--------------------------------|---------------------------------|-------------------------|
| 1. Income Gain Codes:   | A = \$1,000 or less              | B = \$1,001 - \$2,500       | C = \$2,501 - \$5,000          | D = \$5,001 - \$15,000          | E = \$15,001 - \$50,000 |
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| 2. Value Codes          | J = \$15,000 or less             | K = \$15,001 - \$50,000     | L = \$50,001 - \$100,000       | M = \$100,001 - \$250,000       |                         |
| (See Columns C1 and D3) | N = \$250,001 - \$500,000        | O = \$500,001 - \$1,000,000 | P1 = \$1,000,001 - \$5,000,000 | P2 = \$5,000,001 - \$25,000,000 |                         |
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| 3. Value Method Codes   | Q = Appraisal                    | R = Cost (Real Estate Only) | S = Assessment                 | T = Cash Market                 |                         |
| (See Column C2)         | U = Book Value                   | V = Other                   | W = Estimated                  |                                 |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

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

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|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 222. - Home Depot, Inc. Common Stock (X)                                                                                    | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 223. - Honeywell Intl. Inc. Common Stock (X)                                                                                | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 224. - Intuit Inc. Common Stock (X)                                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 225. - JP Morgan Chase Common Stock (X)                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 226. - Johnson & Johnson Common Stock (X)                                                                                   | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 227. - Jones Lang LaSalle Inc. Common Stock (X)                                                                             | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 228. - Juniper Networks Common Stock (X)                                                                                    |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 229. - KLA Tencor Corp. Common Stock (X)                                                                                    | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 230. - KeyCorp. New Common Stock (X)                                                                                        | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 231. - L-3 Communications Holding Inc. Common Stock (X)                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 232. - Liberty Media Co. Liberty Cap A Common Stock (X)                                                                     |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 233. - Liberty Interactive Co. Inter A Common Stock (X)                                                                     |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 234. - Mattel Inc. Common Stock (X)                                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 235. - Merck & Co. Inc. New Common Stock (X)                                                                                | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 236. - Microsoft Corp. Common Stock (X)                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 237. - Monsanto Co. New Common Stock (X)                                                                                    | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 238. - Morgan Stanley Common Stock (X)                                                                                      | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                         |                                  |                             |                                |                                 |                         |
|-------------------------|----------------------------------|-----------------------------|--------------------------------|---------------------------------|-------------------------|
| 1. Income Gain Codes:   | A = \$1,000 or less              | B = \$1,001 - \$2,500       | C = \$2,501 - \$5,000          | D = \$5,001 - \$15,000          | E = \$15,001 - \$50,000 |
| (See Columns B1 and D4) | F = \$50,001 - \$100,000         | G = \$100,001 - \$1,000,000 | H1 = \$1,000,001 - \$5,000,000 | H2 = More than \$5,000,000      |                         |
| 2. Value Codes          | J = \$15,000 or less             | K = \$15,001 - \$50,000     | L = \$50,001 - \$100,000       | M = \$100,001 - \$250,000       |                         |
| (See Columns C1 and D3) | N = \$250,001 - \$500,000        | O = \$500,001 - \$1,000,000 | P1 = \$1,000,001 - \$5,000,000 | P2 = \$5,000,001 - \$25,000,000 |                         |
|                         | P3 = \$25,000,001 - \$50,000,000 |                             | P4 = More than \$50,000,000    |                                 |                         |
| 3. Value Method Codes   | Q = Appraisal                    | R = Cost (Real Estate Only) | S = Assessment                 | T = Cash Market                 |                         |
| (See Column C2)         | U = Book Value                   | V = Other                   | W = Estimated                  |                                 |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

Date of Report

08/22/2012

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                                     |   |          |   |   |  |  |  |  |  |
|-----------------------------------------------------|---|----------|---|---|--|--|--|--|--|
| 239. - National Oilwell Varco Inc. Common Stock (X) | A | Dividend | J | T |  |  |  |  |  |
| 240. Netapp Inc. Common Stock (X)                   |   | None     | J | T |  |  |  |  |  |
| 241. Nike Inc. B Common Stock (X)                   | A | Dividend | J | T |  |  |  |  |  |
| 242. - Noble Energy Inc. Common Stock (X)           | A | Dividend | J | T |  |  |  |  |  |
| 243. - Northrop Grumman Corp. Common Stock (X)      | A | Dividend | J | T |  |  |  |  |  |
| 244. - Novartis AG ADR Common Stock (X)             | A | Dividend | J | T |  |  |  |  |  |
| 245. - Nucor Corp. Common Stock (X)                 | A | Dividend | J | T |  |  |  |  |  |
| 246. - Oracle Corp. Common Stock (X)                | A | Dividend | J | T |  |  |  |  |  |
| 247. - Oshkosh Corp. Common Stock (X)               |   | None     | J | T |  |  |  |  |  |
| 248. - Pall Corp. Common Stock (X)                  | A | Dividend | J | T |  |  |  |  |  |
| 249. - Pebblebrook Hotel TR Common Stock (X)        | A | Dividend | J | T |  |  |  |  |  |
| 250. - Pepsico Inc. NC Common Stock (X)             | A | Dividend | J | T |  |  |  |  |  |
| 251. Procter & Gamble Common Stock (X)              | A | Dividend | J | T |  |  |  |  |  |
| 252. - Qualcomm Inc. Common Stock (X)               | A | Dividend | J | T |  |  |  |  |  |
| 253. - Safeway Inc. New Common Stock (X)            | A | Dividend | J | T |  |  |  |  |  |
| 254. - Sandisk Corp. Common Stock (X)               |   | None     | J | T |  |  |  |  |  |
| 255. - Schlumberger Ltd. Common Stock (X)           | A | Dividend | J | T |  |  |  |  |  |

|                                                  |                                                                                       |                                                        |                                                                                           |                                                              |                         |
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| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                   | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$50,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                           | T = Cash Market                                              |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

Date of Report

08/22/2012

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                                                |   |          |   |   |  |  |  |  |  |
|----------------------------------------------------------------|---|----------|---|---|--|--|--|--|--|
| 256. - Charles Schwab New Common Stock (X)                     | A | Dividend | J | T |  |  |  |  |  |
| 257. - Symantec Corp. Common Stock (X)                         |   | None     | J | T |  |  |  |  |  |
| 258. - Texas Instruments Common Stock (X)                      | A | Dividend | J | T |  |  |  |  |  |
| 259. - Thermo Fisher Scientific Inc. Common Stock (X)          |   | None     | J | T |  |  |  |  |  |
| 260. - US Bancorp New Common Stock (X)                         | A | Dividend | J | T |  |  |  |  |  |
| 261. - Unilever PLC (New) ADS Common Stock (X)                 | A | Dividend | J | T |  |  |  |  |  |
| 262. - United Parcel Service Inc. CL B Common Stock (X)        | A | Dividend | J | T |  |  |  |  |  |
| 263. - United States Steel Corp. New Common Stock (X)          | A | Dividend | J | T |  |  |  |  |  |
| 264. - United Health Group Inc. Common Stock (X)               | A | Dividend | J | T |  |  |  |  |  |
| 265. - Visa Inc. CL A Common Stock (X)                         | A | Dividend | J | T |  |  |  |  |  |
| 266. - Vodafone Group PLC ADS New Common Stock (X)             | A | Dividend | J | T |  |  |  |  |  |
| 267. - Weyerhaeuser Co. Common Stock (X)                       | A | Dividend | J | T |  |  |  |  |  |
| 268. - Covidien PLC New Common Stock (X)                       | A | Dividend | J | T |  |  |  |  |  |
| 269. - Seagate Technology PLC Common Stock (X)                 | A | Dividend | J | T |  |  |  |  |  |
| 270. - Allied World Assurance Co. Holding Ltd Common Stock (X) | A | Dividend | J | T |  |  |  |  |  |
| 271. - Weatherford International Ltd Common Stock (X)          |   | None     | J | T |  |  |  |  |  |
| 272. - TE Connectivity Ltd New Common Stock (X)                | A | Dividend | J | T |  |  |  |  |  |

|                                                  |                                                                                       |                                                        |                                                                                          |                                                              |                         |
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| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$5,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                          | T = Cash Market                                              |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

Date of Report

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

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| A.<br>Description of Assets<br>(including trust assets)<br><br>Place "X" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|---------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                           | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 273. - Tyco International Ltd New Common Stock (X)                                                                        | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 274. Broker Account #6 -- [REDACTED] Pers. Trust                                                                          |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 275. - Dominion Resources Common Stock                                                                                    | B                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 276. - Exxon Mobile Common Stock                                                                                          | C                                       | Dividend                                      | M                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 277. - Pepsico Common Stock                                                                                               | B                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 278. - PNC Financial Services Common Stock                                                                                | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 279. - Walmart Common Stock                                                                                               | B                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 280. - Maryland State Transportation Bonds 07/01/11                                                                       |                                         | None                                          |                                                 |                                           | Redeemed                                        | 07/01/11                | K                               | A                              |                                                                   |
| 281. - Howard County Golf Course Bonds 08/15/12                                                                           | A                                       | Interest                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 282. - Maryland CDA Housing Bonds 07/01/13                                                                                | B                                       | Interest                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 283. - Prince George's County MD Bonds 10/01/15                                                                           | A                                       | Interest                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 284. - Puerto Rico Housing Public Serv. Bonds 07/01/16                                                                    | B                                       | Interest                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 285. - Maryland State Health Higher Education Bonds 07/01/18                                                              | A                                       | Interest                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 286. - Baltimore MD Ser. C Sink Fund 07/01/17                                                                             | B                                       | Interest                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 287. - MFS Maryland Municipal Bond Fund                                                                                   | B                                       | Interest                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 288. Broker Account #7 -- iShares Managed Trust (See Part VIII)                                                           |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 289. - iShares Barclay's Aggregate Bond Fund (X)                                                                          | B                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                          |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
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| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$5,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                          | T = Cash Market                                              |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

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

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|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 290. - iShares Barclay's MBS Bond Fund (X)                                                                                  | B                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 291. - iShares Barclay's 1-3 Yr. CD Bond Fund (X)                                                                           | A                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 292. - iShares Dow Jones US Consumer Services Index Fund (X)                                                                | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 293. - iShares Dow Jones Real Estate Index Fund (X)                                                                         | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 294. - iShares Dow Jones Technology Sector Index Fund (X)                                                                   | A                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 295. - iShares Dow Jones US Consumer Goods Index Fund (X)                                                                   | B                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 296. - iShares Dow Jones US Financial Sector Index Fund (X)                                                                 | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 297. - iShares Dow Jones US Health Care Sector Index Fund (X)                                                               | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 298. - iShares Dow Jones US Energy Sector Index Fund (X)                                                                    | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 299. Broker Account # 8 -- [REDACTED] RMA                                                                                   |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 300. - Baltimore County MD Metro Dist. Bonds 06/01/24                                                                       | A                                       | Interest                                      |                                                 |                                           | Redeemed                                        | 06/01/11                | K                               | A                              |                                                                   |
| 301. - Frederick MD Rfdg & Impt Bonds 08/01/13                                                                              | B                                       | Interest                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 302. - Maryland CDA Hsg Cmty Dev Bonds 07/01/15                                                                             | A                                       | Interest                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 303. - Puerto Rico Elec. Power Auth Bonds 007/01/17                                                                         |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 304. - Maryland State Health & Higher Ed Bonds 07/01/18                                                                     | A                                       | Interest                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 305. - Puerto Rico Commonwealth Pub Ser. B 07/01/20                                                                         | B                                       | Interest                                      |                                                 |                                           | Redeemed                                        | 08/11/11                | K                               | A                              |                                                                   |
| 306. - Blackrock Munivest Fund II                                                                                           | B                                       | Interest                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                          |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
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# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

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

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| A.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 307. - Blackrock Munivest Fund                                                                                              | B                                       | Interest                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 308. - Nuveen Select Tax Free Income Port 3                                                                                 | B                                       | Interest                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 309. - Dreyfus State Mun Bond Fd Maryland Ser Class C                                                                       | B                                       | Interest                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 310. Brker Acct # 9 -- IShares Man Rev. Trust (See Part VIII)                                                               |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 311. - IShares Barclay's Aggregate Bond Fund (X)                                                                            | B                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 312. - IShares Barclay's MBS Bond Fund (X)                                                                                  | B                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 313. - IShares Barclay's 1-3 Yr. CD Bond Fund (X)                                                                           | B                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 314. - IShares Dow Jones US Consumer Services Index Fund (X)                                                                | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 315. - IShares Dow Jones US Real Estate Index Fund (X)                                                                      | B                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 316. - IShares Dow Jones Technology Sector Index Fund (X)                                                                   | A                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 317. - IShares Dow Jones US Consumer Goods Index Fund (X)                                                                   | B                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 318. - IShares Dow Jones US Financial Sector Index Fund (X)                                                                 | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 319. - IShares Dow Jones US Health Care Sector Index Fund (X)                                                               | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 320. - IShares Dow Jones US Energy Sector Index Fund (X)                                                                    | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 321. Broker Account # 10 -- Rev. Trust                                                                                      |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 322. - American Capital Limited Common Stock                                                                                |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 323. - EMC Corp. Mass. Common Stock                                                                                         |                                         | None                                          | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                           |                                                              |                         |
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| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                   | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$50,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                           | T = Cash Market                                              |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

Date of Report

08/22/2012

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 324. - Schlumberger Ltd. Common Stock                                                                                       | A                                       | Dividend                                      | K                                               | T                                         | Buy                                             | 11/23/11                | K                               |                                |                                                                   |
| 325. - Schlumberger Ltd. Common Stock                                                                                       | A                                       | Dividend                                      | K                                               | T                                         | Buy<br>(add'l)                                  | 12/19/11                | J                               |                                |                                                                   |
| 326. - ING Clarion Global Real Estate Fund                                                                                  | B                                       | Interest                                      | K                                               | T                                         | Buy<br>(add'l)                                  | 12/19/11                | K                               |                                |                                                                   |
| 327. - Kayne Anderson Energy Fund                                                                                           | C                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 328. - ACAP Strategic Fund Shares Mutual Fund                                                                               |                                         | None                                          | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 329. - Hartford Municipal Opp. Fund Class C                                                                                 | C                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 330. - Legg Mason Western Asset Mun. Class C                                                                                | B                                       | Dividend                                      | L                                               | T                                         | Sold<br>(part)                                  | 12/20/11                | J                               | A                              |                                                                   |
| 331. - Principal Investment Fund                                                                                            | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 332. Broker Account # 11 -- IRA                                                                                             |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 333. - Tortoise MLP Fund                                                                                                    | B                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 334. - CFI ELKS based upon SLB Common Stock                                                                                 | A                                       | Dividend                                      |                                                 |                                           | Redeemed                                        | 05/25/11                | J                               | A                              |                                                                   |
| 335. - CFI ELKS based upon BBY Common Stock                                                                                 | A                                       | Dividend                                      |                                                 |                                           | Redeemed                                        | 04/20/11                | K                               | A                              |                                                                   |
| 336. - Citigroup ELKS based upon General Electric Common Stock                                                              | A                                       | Dividend                                      |                                                 |                                           | Redeemed                                        | 03/23/11                | K                               | A                              |                                                                   |
| 337. - Morgan Stanley ELKS based upon Baker Hughes Com. Stk.                                                                | A                                       | Dividend                                      |                                                 |                                           | Redeemed                                        | 03/23/11                | K                               | A                              |                                                                   |
| 338. - Best Buy Common Stock                                                                                                | A                                       | Dividend                                      | K                                               | T                                         | Buy                                             | 04/20/11                | K                               |                                |                                                                   |
| 339. - Chesapeake Energy Corp. Common Stock                                                                                 | A                                       | Dividend                                      | K                                               | T                                         | Buy                                             | 09/21/11                | K                               |                                |                                                                   |
| 340. - Schlumberger Ltd. Common Stock                                                                                       | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 11/23/11                | J                               |                                |                                                                   |

|                                                  |                                                                                        |                                                        |                                                                                           |                                                              |                         |
|--------------------------------------------------|----------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                        | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                   | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$250,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$50,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                        | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                           | T = Cash Market                                              |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

Date of Report

08/22/2012

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 341. - Schlumberger Ltd. Common Stock                                                                                       | A                                       | Dividend                                      | J                                               | T                                         | Buy<br>(add'l)                                  | 12/19/11                | J                               |                                |                                                                   |
| 342. Broker Account # 12 -- [REDACTED] IRA Trust                                                                            |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 343. - United Health Group Common Stock                                                                                     | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 344. - Calamos Strategy Fund                                                                                                | B                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 345. - Hartford Floating Rate Fund                                                                                          | B                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 346. - Pimco Commodity Real Return Strategy Fund                                                                            | D                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 347. - Putnam Diversified Income Trust Fund, Class C                                                                        | C                                       | Dividend                                      | K                                               | T                                         | Buy<br>(add'l)                                  | 12/19/11                | J                               |                                |                                                                   |
| 348. Broker Account # 13 -- [REDACTED] IRA Trust                                                                            |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 349. - Bristol Myers Squibb Common Stock                                                                                    | B                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 350. - ECA Marcellus Trust                                                                                                  | C                                       | Dividend                                      |                                                 |                                           | Sold                                            | 02/15/11                | L                               | D                              |                                                                   |
| 351. - Energy Transfer Partners LP                                                                                          | C                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 352. - Exxon Mobile Common Stock                                                                                            | B                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 353. - Ford Motor Co. Common Stock                                                                                          | A                                       | Dividend                                      | K                                               | T                                         | Buy                                             | 03/28/11                | K                               |                                |                                                                   |
| 354. - Ford Motor Co. Common Stock                                                                                          | A                                       | Dividend                                      | J                                               | T                                         | Buy<br>(add'l)                                  | 06/15/11                | J                               |                                |                                                                   |
| 355. - Ford Motor Co. Common Stock                                                                                          | A                                       | Dividend                                      | J                                               | T                                         | Buy<br>(add'l)                                  | 12/19/11                | J                               |                                |                                                                   |
| 356. - Microsoft Corp. Common Stock                                                                                         | A                                       | Dividend                                      | K                                               | T                                         | Buy                                             | 03/28/11                | K                               |                                |                                                                   |
| 357. - Verizon Common Stock                                                                                                 | B                                       | Dividend                                      |                                                 |                                           | Sold                                            | 03/28/11                | K                               | D                              |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                           |                                                              |                         |
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| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$50,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                           | T = Cash Market                                              |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

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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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                                                             |   |          |   |   |     |          |   |  |  |
|-----------------------------------------------------------------------------|---|----------|---|---|-----|----------|---|--|--|
| 358. - U.S. Steel Common Stock                                              | A | Dividend | J | T | Buy | 03/28/11 | K |  |  |
| 359. - Bank of America Preferred Stock                                      | B | Dividend | J | T |     |          |   |  |  |
| 360. - Principal Inv. Pref. Sec. Mut. Fund                                  | B | Dividend | K | T |     |          |   |  |  |
| 361. Brker Acct #14--For IShares [REDACTED] IRA<br>Man Acct (See Part VIII) |   |          |   |   |     |          |   |  |  |
| 362. - MS Liquid Asset Fund Money Market (X)                                | A | Interest | J | T |     |          |   |  |  |
| 363. - IShares MSCI Australia Index Fund (X)                                | A | Dividend | K | T |     |          |   |  |  |
| 364. - IShares MSCI Brazil Index Fund (X)                                   | A | Dividend | K | T |     |          |   |  |  |
| 365. - IShares MSCI South Korea Index Fund (X)                              | A | Dividend | K | T |     |          |   |  |  |
| 366. - IShares MSCI South Africa Index Fund<br>(X)                          | A | Dividend | K | T |     |          |   |  |  |
| 367. - IShares MSCI Germany Index Fund (X)                                  | A | Dividend | K | T |     |          |   |  |  |
| 368. Broker Account #15 - [REDACTED] IRA Managed<br>Account (See Part VIII) |   |          |   |   |     |          |   |  |  |
| 369. - MS Liquid Asset Fund (X)                                             | A | Interest | J | T |     |          |   |  |  |
| 370. - Agilent Technologies Common Stock (X)                                |   | None     | J | T |     |          |   |  |  |
| 371. - American Express Co. Common Stock (X)                                | A | Dividend | K | T |     |          |   |  |  |
| 372. - Ameriprise Financial Inc. Common Stock<br>(X)                        | A | Dividend | J | T |     |          |   |  |  |
| 373. - Bank of New York Mellon Corp. Common<br>Stock (X)                    | A | Dividend | J | T |     |          |   |  |  |
| 374. - Baxter Intl. Inc. Common Stock (X)                                   | A | Dividend | J | T |     |          |   |  |  |

|                                                  |                                                                                       |                                                        |                                                                                           |                                                              |                         |
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# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

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

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|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 375. - Becton Dickinson & Co. Common Stock (X)                                                                              | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 376. - Bed Bath & Beyond Common Stock (X)                                                                                   |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 377. - Berkshire Hathaway CL B New Common Stock (X)                                                                         |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 378. - CVS Caremark Corp. Common Stock (X)                                                                                  | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 379. - Canadian Natural Resources Ltd. Common Stock (X)                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 380. - Coca Cola Co. Common Stock (X)                                                                                       | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 381. - Costco Wholesale Corp. New Common Stock (X)                                                                          | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 382. - Devon Energy Corp. New Common Stock (X)                                                                              | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 383. - Diageo PLC Spon. ADR New Common Stock (X)                                                                            | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 384. - Walt Disney Co. Holding Common Stock (X)                                                                             | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 385. - EOG Resources Inc. Common Stock (X)                                                                                  | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 386. - Express Scripts Holding Co. Common Stock (X)                                                                         |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 387. - Google Inc. CL A Common Stock (X)                                                                                    |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 388. - Grupo Televisa SA DE CV Spon. ADR Common Stock (X)                                                                   | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 389. - Harley Davidson Inc. Common Stock (X)                                                                                | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 390. - Hewlett Packard Common Stock (X)                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 391. - Iron Mountain Inc. (DE) Common Stock (X)                                                                             | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                          |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                  | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$5,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                          | T = Cash Market                                              |                         |

**FINANCIAL DISCLOSURE REPORT**

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Name of Person Reporting

Wheeler, Thomas C.

Date of Report

08/22/2012

**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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 392. - Johnson & Johnson Common Stock (X)                                                                                   | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 393. - Kraft Foods Inc. CL A Common Stock (X)                                                                               | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 394. - Lockheed Martin Corp. Common Stock (X)                                                                               | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 395. - Loew's Corp. Common Stock (X)                                                                                        | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 396. - Merck & Co. New Common Stock (X)                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 397. - Microsoft Corp. Common Stock (X)                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 398. - Monsanto Co. New Common Stock (X)                                                                                    | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 399. - Occidental Petroleum Corp. (DE) Common Stock (X)                                                                     | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 400. - Pfizer Inc. Common Stock (X)                                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 401. - Philip Morris Intl. Common Stock (X)                                                                                 | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 402. - Progressive Corp. Ohio Common Stock (X)                                                                              | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 403. - Sealed Air Corp. New Common Stock (X)                                                                                | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 404. - Texas Instruments Common Stock (X)                                                                                   | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 405. - Transatlantic Holdings Inc. Common Stock (X)                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 406. - Wells Fargo & Co. (New) Common Stock (X)                                                                             | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 407. - Transocean Ltd. Common Stock (X)                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 408. Broker Account #16 -- [REDACTED] Trust                                                                                 |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                          |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                  | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$5,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                          | T = Cash Market                                              |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

Date of Report

08/22/2012

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 409. - CVS Caremark Common Stock                                                                                            | A                                       | Dividend                                      | K                                               | T                                         | Buy<br>(add'l)                                  | 02/03/11                | K                               |                                |                                                                   |
| 410. - Celgene Common Stock                                                                                                 |                                         | None                                          | L                                               | T                                         | Buy<br>(add'l)                                  | 02/03/11                | K                               |                                |                                                                   |
| 411. - Energy Transfer Equity LP                                                                                            | C                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 412. - Enterprise Products Partners LP                                                                                      | C                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 413. - General Electric Common Stock                                                                                        | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 414. - Merck Common Stock                                                                                                   | B                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 415. - Murphy Oil Common Stock                                                                                              | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 416. - Vale Common Stock                                                                                                    | A                                       | Dividend                                      | K                                               | T                                         | Buy<br>(add'l)                                  | 03/28/11                | K                               |                                |                                                                   |
| 417. - Williams Cos. Common Stock                                                                                           | B                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 418. - Nuveen NFM MTP Preferred                                                                                             | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 419. - Nuveen MD Dividend Muni Fund                                                                                         | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 420. - Ginnie Mae Series 2009-68 Class G                                                                                    | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 421. - Hartford Floating Rate Fund                                                                                          | A                                       | Dividend                                      | J                                               | T                                         | Buy<br>(add'l)                                  | 03/04/11                | J                               |                                |                                                                   |
| 422. - Legg Mason WA SHT Muni Fund                                                                                          | B                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 423. - Legg Mason Western Asset Muni Fund                                                                                   | C                                       | Dividend                                      | L                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 424. Broker Account #17--Small Cap Man. Trust<br>(See Part VIII)                                                            |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 425. - MS Liquid Asset Fund (X)                                                                                             | A                                       | Interest                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                         |                                  |                             |                                |                                 |                         |
|-------------------------|----------------------------------|-----------------------------|--------------------------------|---------------------------------|-------------------------|
| 1. Income Gain Codes:   | A = \$1,000 or less              | B = \$1,001 - \$2,500       | C = \$2,501 - \$5,000          | D = \$5,001 - \$15,000          | E = \$15,001 - \$50,000 |
| (See Columns B1 and D4) | F = \$50,001 - \$100,000         | G = \$100,001 - \$1,000,000 | H1 = \$1,000,001 - \$5,000,000 | H2 = More than \$5,000,000      |                         |
| 2. Value Codes          | J = \$15,000 or less             | K = \$15,001 - \$50,000     | L = \$50,001 - \$100,000       | M = \$100,001 - \$250,000       |                         |
| (See Columns C1 and D3) | N = \$250,001 - \$500,000        | O = \$500,001 - \$1,000,000 | P1 = \$1,000,001 - \$5,000,000 | P2 = \$5,000,001 - \$25,000,000 |                         |
|                         | P3 = \$25,000,001 - \$50,000,000 |                             | P4 = More than \$50,000,000    |                                 |                         |
| 3. Value Method Codes   | Q = Appraisal                    | R = Cost (Real Estate Only) | S = Assessment                 | T = Cash Market                 |                         |
| (See Column C2)         | U = Book Value                   | V = Other                   | W = Estimated                  |                                 |                         |

# FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Wheeler, Thomas C.

Date of Report

08/22/2012

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 426. - Alger Small Cap Growth Inst. (X)                                                                                     |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 427. - American Century Int. TRM TX FR BD<br>Inv. (X)                                                                       | B                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 428. - American Century Intl. Bond Inv. (X)                                                                                 | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 429. - Artisan Midcap Value Inv. (X)                                                                                        | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 430. - Baron Small Cap Retail (X)                                                                                           |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 431. - Columbia Marsico Growth Z (X)                                                                                        |                                         | None                                          | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 432. - Columbia Marsico Intl Opp. Z (X)                                                                                     |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 433. - Davis New York Venture Y (X)                                                                                         | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 434. - American Europacific Growth F1 (X)                                                                                   | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 435. - Goldman Sachs Growth Opp. 1 (X)                                                                                      |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 436. - American Growth Fund of America F1 (X)                                                                               | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 437. - JP Morgan Emerging Markets Sel (X)                                                                                   | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 438. - Lazard Emerging Markets 1 (X)                                                                                        | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 439. - Legg Mason WA Interim Muni Inst. (X)                                                                                 | B                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 440. - Mainstay ICAP Select Equity 1 (X)                                                                                    | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 441. - PIMCO Emerging Local BD P (X)                                                                                        | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 442. - T Rowe Price High Yield (X)                                                                                          | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                         |                                  |                             |                                |                                 |                         |
|-------------------------|----------------------------------|-----------------------------|--------------------------------|---------------------------------|-------------------------|
| 1. Income Gain Codes:   | A = \$1,000 or less              | B = \$1,001 - \$2,500       | C = \$2,501 - \$5,000          | D = \$5,001 - \$15,000          | E = \$15,001 - \$50,000 |
| (See Columns B1 and D4) | F = \$50,001 - \$100,000         | G = \$100,001 - \$1,000,000 | H1 = \$1,000,001 - \$5,000,000 | H2 = More than \$5,000,000      |                         |
| 2. Value Codes          | J = \$15,000 or less             | K = \$15,001 - \$50,000     | L = \$50,001 - \$100,000       | M = \$100,001 - \$250,000       |                         |
| (See Columns C1 and D3) | N = \$250,001 - \$500,000        | O = \$500,001 - \$1,000,000 | P1 = \$1,000,001 - \$5,000,000 | P2 = \$5,000,001 - \$25,000,000 |                         |
|                         | P3 = \$25,000,001 - \$50,000,000 |                             | P4 = More than \$50,000,000    |                                 |                         |
| 3. Value Method Codes   | Q = Appraisal                    | R = Cost (Real Estate Only) | S = Assessment                 | T = Cash Market                 |                         |
| (See Column C2)         | U = Book Value                   | V = Other                   | W = Estimated                  |                                 |                         |

**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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                                                     |   |          |   |   |  |  |  |  |  |
|---------------------------------------------------------------------|---|----------|---|---|--|--|--|--|--|
| 443. - T Rowe Price Mid-Cap Growth (X)                              |   | None     | J | T |  |  |  |  |  |
| 444. - Royce Micro-cap Inv. (X)                                     | A | Dividend | J | T |  |  |  |  |  |
| 445. - Royce Total Return Inv. (X)                                  | A | Dividend | J | T |  |  |  |  |  |
| 446. - Templeton Global Bond Fd Adv (X)                             | A | Dividend | J | T |  |  |  |  |  |
| 447. - CRM Mid-cap Value Instl. (X)                                 | A | Dividend | J | T |  |  |  |  |  |
| 448. - Wells Fargo High Income Inv. (X)                             | A | Dividend | J | T |  |  |  |  |  |
| 449. Broker Account #18 -- [REDACTED] Annuities                     |   |          |   |   |  |  |  |  |  |
| 450. - Tactical Diversified Futures Fund LP                         |   | None     | K | T |  |  |  |  |  |
| 451. - Sun Life of Canada Annuity                                   |   | None     | M | T |  |  |  |  |  |
| 452. - Nationwide Life & Annuity                                    |   | None     | M | T |  |  |  |  |  |
| 453. - Skybridge Multi-Advisor Hedge Fund                           |   | None     | K | T |  |  |  |  |  |
| 454. Broker Account #19 -- US Bank [REDACTED] Trust (See Part VIII) |   |          |   |   |  |  |  |  |  |
| 455. - First American Prime Obligation Fund (X)                     |   | None     | J | T |  |  |  |  |  |
| 456. - iShares Iboxx H Y Corp Bond (X)                              | A | Dividend | J | T |  |  |  |  |  |
| 457. - Nuveen Inter. Tax Free Fund (X)                              | C | Dividend | L | T |  |  |  |  |  |
| 458. - Allergan Inc. Common Stock (X)                               | A | Dividend | J | T |  |  |  |  |  |
| 459. - Apache Corp. Common Stock (X)                                | A | Dividend | J | T |  |  |  |  |  |

|                                                  |                                                                                       |                                                        |                                                                                           |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                   | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$50,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                           | T = Cash Market                                              |                         |

**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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                                            |   |          |   |   |  |  |  |  |  |
|------------------------------------------------------------|---|----------|---|---|--|--|--|--|--|
| 460. - Apple Inc. Common Stock (X)                         |   | None     | J | T |  |  |  |  |  |
| 461. - AT&T Inc. Common Stock (X)                          | A | Dividend | J | T |  |  |  |  |  |
| 462. - Bristol Myers Squibb Co. Common Stock (X)           | A | Dividend | J | T |  |  |  |  |  |
| 463. - Cameron Intl. Corp. Common Stock (X)                |   | None     | J | T |  |  |  |  |  |
| 464. - Cincinnati Intl. Corp. Common Stock (X)             | A | Dividend | J | T |  |  |  |  |  |
| 465. - Discovery Communications Inc. CL A Common Stock (X) |   | None     | J | T |  |  |  |  |  |
| 466. - EMC Corp. Common Stock (X)                          |   | None     | J | T |  |  |  |  |  |
| 467. - Ecolab Inc. Common Stock (X)                        | A | Dividend | J | T |  |  |  |  |  |
| 468. - Emerson Electric Co. Common Stock (X)               | A | Dividend | J | T |  |  |  |  |  |
| 469. - Exxon Mobile Corp. Common Stock (X)                 | A | Dividend | J | T |  |  |  |  |  |
| 470. - General Electric Co. Common Stock (X)               | A | Dividend | J | T |  |  |  |  |  |
| 471. - Google Inc. Common Stock (X)                        |   | None     | J | T |  |  |  |  |  |
| 472. - Intel Corp. Common Stock (X)                        | A | Dividend | J | T |  |  |  |  |  |
| 473. - JP Morgan Chase Co. Common Stock (X)                | A | Dividend | J | T |  |  |  |  |  |
| 474. - Johnson & Johnson Common Stock (X)                  | A | Dividend | J | T |  |  |  |  |  |
| 475. - Mastercard Inc. Common Stock (X)                    | A | Dividend | J | T |  |  |  |  |  |
| 476. - McDonald's Corp. Common Stock (X)                   | A | Dividend | J | T |  |  |  |  |  |

|                                                  |                                                                                       |                                                        |                                                                                           |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                   | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes:<br>(See Columns C1 and D3)       | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$50,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes:<br>(See Column C2)        | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                           | T = Cash Market                                              |                         |

**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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                                       |   |          |   |   |  |  |  |  |  |
|-------------------------------------------------------|---|----------|---|---|--|--|--|--|--|
| 477. - McKesson Corp. Common Stock (X)                | A | Dividend | J | T |  |  |  |  |  |
| 478. - Medco Health Solutions Inc. Common Stock (X)   |   | None     | J | T |  |  |  |  |  |
| 479. - Nextera Energy Inc. Common Stock (X)           | A | Dividend | J | T |  |  |  |  |  |
| 480. - Nordstrom Inc. Common Stock (X)                | A | Dividend | J | T |  |  |  |  |  |
| 481. - Oracle Corp. Common Stock (X)                  | A | Dividend | J | T |  |  |  |  |  |
| 482. - Pepsico Inc. Common Stock (X)                  | A | Dividend | J | T |  |  |  |  |  |
| 483. - Philip Morris Intl. Common Stock (X)           | A | Dividend | J | T |  |  |  |  |  |
| 484. - Polaris Ind. Inc. Common Stock (X)             | A | Dividend | J | T |  |  |  |  |  |
| 485. - Praxair Inc. Common Stock (X)                  | A | Dividend | J | T |  |  |  |  |  |
| 486. - Priceline Com. Inc. Common Stock (X)           |   | None     | J | T |  |  |  |  |  |
| 487. - Procter & Gamble Inc. Common Stock (X)         | A | Dividend | J | T |  |  |  |  |  |
| 488. - Prudential Financial Inc. Common Stock (X)     | A | Dividend | J | T |  |  |  |  |  |
| 489. - Qualcomm Inc. Common Stock (X)                 | A | Dividend | J | T |  |  |  |  |  |
| 490. - Teradata Corp. Del Common Stock (X)            |   | None     | J | T |  |  |  |  |  |
| 491. - Thermo Fisher Scientific Inc. Common Stock (X) |   | None     | J | T |  |  |  |  |  |
| 492. - United Health Group, Inc. Common Stock (X)     | A | Dividend | J | T |  |  |  |  |  |
| 493. - Visa Inc. CL A Common Stock (X)                | A | Dividend | J | T |  |  |  |  |  |

|                                                  |                                                                                       |                                                        |                                                                                           |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
| 1. Income Gain Codes:<br>(See Columns B1 and D4) | A = \$1,000 or less<br>F = \$50,001 - \$100,000                                       | B = \$1,001 - \$2,500<br>G = \$100,001 - \$1,000,000   | C = \$2,501 - \$5,000<br>H1 = \$1,000,001 - \$5,000,000                                   | D = \$5,001 - \$15,000<br>H2 = More than \$5,000,000         | E = \$15,001 - \$50,000 |
| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$50,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                           | T = Cash Market                                              |                         |

**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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 494. - Windstream Corp. Common Stock (X)                                                                                    | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 495. - 3M Co. Common Stock (X)                                                                                              | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 496. - Accenture PLC Cl A Common Stock (X)                                                                                  | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 497. - Ace Ltd. Common Stock (X)                                                                                            | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 498. - Check Point Software Tech Ltd. Common Stock (X)                                                                      |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 499. - Royal Dutch Shell PLC a D R Common Stock (X)                                                                         | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 500. - Schlumberger Ltd. Common Stock (X)                                                                                   | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 501. - Goldman Sachs M C Value Cl Inst. (X)                                                                                 | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 502. - Highland Long Short Equity Z (X)                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 503. - iPath Dow Jones UBS Commodity (X)                                                                                    |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 504. - iShares MSCI Emerging Markets ETF (X)                                                                                | A                                       | Dividend                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 505. - Nuveen Intl. Select Fd Cl I (X)                                                                                      | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 506. - T Rowe Price Mid-cap Growth Fd #64 (X)                                                                               |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 507. - SPDR Dow Jones Intl. (X)                                                                                             | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 508. - TFS Market Neutral Fund (X)                                                                                          |                                         | None                                          | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

|                                                  |                                                                                       |                                                        |                                                                                          |                                                              |                         |
|--------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------|------------------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------|
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| 2. Value Codes<br>(See Columns C1 and D3)        | J = \$15,000 or less<br>N = \$250,001 - \$500,000<br>P3 = \$25,000,001 - \$50,000,000 | K = \$15,001 - \$50,000<br>O = \$500,001 - \$1,000,000 | L = \$50,001 - \$100,000<br>P1 = \$1,000,001 - \$5,000,000<br>P4 = More than \$5,000,000 | M = \$100,001 - \$250,000<br>P2 = \$5,000,001 - \$25,000,000 |                         |
| 3. Value Method Codes<br>(See Column C2)         | Q = Appraisal<br>U = Book Value                                                       | R = Cost (Real Estate Only)<br>V = Other               | S = Assessment<br>W = Estimated                                                          | T = Cash Market                                              |                         |

# FINANCIAL DISCLOSURE REPORT

Page 34 of 35

Name of Person Reporting

Wheeler, Thomas C.

Date of Report

08/22/2012

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

Section VII, line 3, Potomac Cliffs at Watson House Real Estate Partnership, purchased on 4/20/1987 at cost of \$26,150 (1/2-share).

Section VII, lines 64-168, 170-273, 289-298, 311-320, 362-367, 369-407, 425-448, and 455-508, show itemized assets that are being reported for the first time this year pursuant to new direction from the Committee on Financial Disclosure. All of these assets are marked with an "X" to show that they previously were not required to be reported. These assets are in broker managed accounts, where I am not involved in the buying or selling of assets. I have no control over the investments made in these managed accounts. Nevertheless, the Committee on Financial Disclosure now requires that the individual assets in these accounts must be reported.

**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/ Thomas C. Wheeler**

**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  
Suite 2-301  
One Columbus Circle, N.E.  
Washington, D.C. 20544