

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2014

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

1. Person Reporting (last name, first, middle initial) Armen Jr., Robert N.	2. Court or Organization United States Tax Court	3. Date of Report 04/07/2015
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Special Trial Judge	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2014 to 12/31/2014
7. Chambers or Office Address UNITED STATES TAX COURT 400 Second St., N.W. Washington, D.C. 20217		
IMPORTANT NOTES: The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.		

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

☐ NONE (No reportable positions.)

POSITION

NAME OF ORGANIZATION/ENTITY

1. Co-trustee ((see Parts VII. & VIII.))	testamentary trust
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.	
2.	
3.	

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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.)*DATESOURCE AND TYPEINCOME

(yours, not spouse's)

1. _____

2. _____

3. _____

4. _____

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

1. _____

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.)*SOURCEDATESLOCATIONPURPOSEITEMS PAID OR PROVIDED

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.)*

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

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

☒ NONE *(No reportable liabilities.)*

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

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
	(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
1. Dominion Resources stock	C	Dividend	L	T	Buy (add'l)	10/27/14	K		
2. AT&T stock	C	Dividend	L	T					
3. Marathon Oil Corp. stock	C	Dividend	M	T					
4. Marathon Petroleum Corp. stock	C	Dividend	M	T					
5. Glaxo-Smith-Klein stock	A	Dividend	J	T					
6. Prudential Financial Inc. stock	A	Dividend	J	T					
7. American Electric Power stock	B	Dividend	K	T					
8. Walt Disney Company stock	A	Dividend	K	T					
9. Chevron Corporation stock	C	Dividend	M	T					
10. NRG Energy Inc. stock	A	Dividend	J	T					
11. Frontier Communication Inc. stock	A	Dividend	J	T					
12. PPG Industries Inc. stock	B	Dividend	K	T					
13. PA Power & Light (PPL Corp.) stock	D	Dividend	M	T					
14. Merck & Company stock	A	Dividend	K	T					
15. U.S. Steel Corp. stock	A	Dividend	J	T					
16. CenterPoint Energy Inc. stock	C	Dividend	L	T					
17. Verizon Communications Inc. stock	D	Dividend	M	T	Buy (add'l)	10/29/14	K		

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		

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18. Comcast Corporation stock	A	Dividend	K	T					
19. Teco Energy Inc. stock	A	Dividend	K	T					
20. Exxon-Mobil Corp. stock	A	Dividend	K	T	Buy	10/29/14	K		
21. Dreyfus Municipal Bond Fund	C	Dividend	L	T					
22. Dreyfus Disciplined Stock Fund	C	Dividend	K	T					
23. Dreyfus GNMA Fund	A	Dividend	K	T					
24. T. Rowe Price International Stock Fund	B	Dividend	K	T					
25. T. Rowe Price Capital Appreciation Fund	B	Dividend	K	T					
26. T. Rowe Price VA Tax-Free Fund	B	Dividend	K	T	Buy (add'l)	08/04/14	J		
27. T. Rowe Price VA Tax-Free Fund	B	Dividend	K	T	Buy (add'l)	10/16/14	J		
28. Vanguard Prime Money Market Fund	A	Interest	J	T					
29. Vanguard Long-Term Bond Fund	D	Dividend	M	T	Buy (add'l)	02/27/14	J		
30. Vanguard Long-Term Bond Fund	D	Dividend	M	T	Buy (add'l)	10/16/14	J		
31. Vanguard International Growth Fund	C	Dividend	L	T					
32. Vanguard Index Fund - Small Cap Portfolio	C	Dividend	L	T	Buy (add'l)	02/27/14	J		
33. Third Avenue Value Fund	A	Dividend	J	T					
34. Mairs & Power Growth Fund	A	Dividend	J	T					

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

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35. Columbia Value & Restructuring Fund	B	Dividend	K	T					
36. Columbia Tax-Exempt Fund	B	Dividend	K	T					
37. DWS Municipal Bond Fund	A	Dividend	K	T					
38. Delaware Health Care Fund	C	Dividend	L	T					
39. Fidelity Over-the-Counter Fund	B	Dividend	K	T					
40. Invesco Corporate Bond Fund	A	Dividend	J	T					
41. Capital One Bank	B	Interest	L	T					
42. Senate Federal Credit Union	B	Interest	K	T					
43. Bank of Scotland/ Halifax PLC (U.K.)	A	Interest	J	T					
44. U.S. Government obligations	B	Interest	K	T					
45. Bank of Lancaster	A	Interest	L	T					
46. Raymond James Bank	B	Interest	L	T					
47. PNC Bank	B	Interest	K	T					
48. Aberdeen Emerging Markets Fund (ETF)	A	Dividend	J	T					
49. Morgan-Stanley Emerging Markets Fund (MSF)	A	Dividend	J	T					
50. Vanguard REIT Index Portfolio Fund	C	Dividend	L	T					
51. Vanguard Dividend Growth Fund	B	Dividend	K	T					

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52. Vanguard Equity Income Fund	A	Dividend	K	T					
53. Vanguard 500 Index Fund	A	Dividend	K	T					
54. Vanguard Index Trust - European Stock Portfolio Fund	A	Dividend	K	T					
55. Vanguard Growth & Income Fund	A	Dividend	J	T					
56. Vanguard Balanced Index Fund	A	Dividend	J	T					
57. Vanguard GNMA Fund	A	Dividend	K	T					
58. Vanguard Long-Term Corporate Bond Fund	B	Dividend	K	T					
59. Vanguard Health Care Fund	D	Dividend	L	T	Buy (add'l)	01/10/14	J		
60. Vanguard Health Care Fund	D	Dividend	L	T	Buy (add'l)	03/26/14	L		
61. Vanguard Health Care Fund	D	Dividend	L	T	Buy (add'l)	10/24/14	K		
62. Vanguard Energy Fund	A	Dividend	J	T	Buy (add'l)	01/10/14	J		
63. Vanguard Diversified Equity Fund	B	Dividend	K	T	Buy	03/26/14	K		
64. Vanguard Balanced Index Fund	A	Dividend	J	T	Buy	10/24/14	J		
65. Vanguard High Dividend Yield Index Fund	A	Dividend	J	T	Buy	11/04/14	J		
66. Vanguard Mid-Cap Index Fund	A	Dividend	J	T	Buy	10/24/14	J		
67. Hartford Checks & Balances Fund	A	Dividend			Sold	03/20/14	L	C	
68. Invesco Developing Markets Fund (GTDDX)	A	Dividend	J	T					

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69. American Select Portfolio Inc. stock	A	Dividend			Sold	09/09/14	J	A	
70. Diversified Real Asset Inc. stock	A	Dividend	J	T	Buy	09/09/14	J		
71. Diversified Real Asset Inc. stock	A	Dividend	J	T	Sold (part)	09/24/14	J	A	
72. Tecumseh Products Company (Class B) stock	A	Dividend	J	T	Sold (part)	01/03/14	J	A	
73. Tecumseh Products Company (Class B) stock	A	Dividend	J	T	Sold (part)	01/22/14	J	A	
74. DSP Group Inc. stock	A	Dividend	J	T					
75. Goodrich Petroleum Corp. notes	A	Interest	J	T					
76. Digital Generation Inc. stock	A	Dividend			Sold	02/10/14	J	A	
77. Tetra Mechnologies Inc. stock	A	Dividend			Sold	04/24/14	J	A	
78. Mercer International Inc. notes	A	Interest			Redeemed	11/26/14	J	A	
79. Clayton Williams Energy Inc. notes	A	Interest	J	T					
80. MVC Capital Inc. notes	A	Interest	J	T					
81. Resolute Energy Corp. notes	A	Interest	J	T					
82. Cenveo Corporation bonds	A	Interest			Redeemed	06/05/14	J	A	
83. Tower Group Inc. notes	A	Interest			Matured	09/16/14	J	A	
84. Oxford Lane Capital Corp. stock	A	Dividend	J	T					
85. BPZ Resources Inc. notes	A	Interest	J	T	Buy	10/10/14	J		

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86. Ultra Petroleum Corp. (Canada) stock	A	Dividend			Sold (part)	01/30/14	J	A	
87. Ultra Petroleum Corp. (Canada) stock	A	Dividend			Sold	03/31/14	J	A	
88. Market Vectors Gold Miner ETF TR (GDX)	A	Dividend	J	T	Buy (add'l)	01/21/14	J		
89. Sandstorm Metals & Energy Ltd (Canada) stock	A	Dividend			Sold	06/26/14	J	A	
90. Appe Inc. stock	A	Dividend	K	T	Sold (part)	04/30/14	J	A	
91. Apple Inc. stock	A	Dividend	K	T	Sold (part)	07/08/14	J	A	
92. Apple Inc. stock	A	Dividend	K	T	Sold (part)	08/25/14	J	A	
93. Apple Inc. stock	A	Dividend	K	T	Buy (add'l)	10/27/14	K		
94. Tesco PLC Ord stock	A	Dividend			Sold	07/22/14	J	A	
95. Transcept Pharmaceuticals Inc. stock	A	Dividend			Sold	10/31/14	J	A	
96. Aeropostale stock	A	Dividend	J	T					
97. Lai Sun Development Company Ltd stock	A	Dividend	J	T					
98. Tower Group International Inc. stock	A	Dividend			Sold	02/12/14	J	A	
99. Randgold Res Ltd ADR (Gold) stock (acquire)	A	Dividend			Buy	01/16/14	J		
100. Randgold Res Ltd ADR (Gold) stock (sell)	A	Dividend			Sold	04/24/14	J	A	
101. Compuware Corp. stock (acquire)	A	Dividend			Buy	01/23/14	J		
102. Compuware Corp. stock (sell)	A	Dividend			Sold	12/17/14	J	A	

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103. Weight Watchers International Inc. stock (acquire)	A	Dividend			Buy	01/24/14	J		
104. Weight Watchers International Inc. stock (sell)	A	Dividend			Sold	05/01/14	J	A	
105. Rosetta Stone Inc. stock	A	Dividend	J	T	Buy	02/26/14	J		
106. Rosetta Stone Inc. stock	A	Dividend	J	T	Buy (add'l)	05/13/14	J		
107. Rosetta Stone Inc. stock	A	Dividend	J	T	Buy (add'l)	06/09/14	J		
108. Rosetta Stone Inc. stock	A	Dividend	J	T	Buy (add'l)	08/12/14	J		
109. Goodrich Pete Corp. Com NEW stock (acquire)	A	Dividend			Buy	03/04/14	J		
110. Goodrich Pete Corp. Com NEW stock (sell)	A	Dividend			Sold	04/15/14	J	A	
111. BPZ Resources Inc. stock	A	Dividend	J	T	Buy	03/18/14	J		
112. BPZ Resources Inc. stock	A	Dividend	J	T	Buy (add'l)	06/05/14	J		
113. Seachange International Inc. stock	A	Dividend	J	T	Buy	03/21/14	J		
114. Seachange International Inc. stock	A	Dividend	J	T	Buy (add'l)	04/07/14	J		
115. Seachange International Inc. stock	A	Dividend	J	T	Buy (add'l)	06/10/14	J		
116. Seachange International Inc. stock	A	Dividend	J	T	Buy (add'l)	12/16/14	J		
117. Quantum Corp. Com stock (acquire)	A	Dividend			Buy	04/08/14	J		
118. Quantum Corp. Com stock (sell)	A	Dividend			Sold	11/21/14	J	A	
119. Sizmek Inc. stock	A	Dividend	J	T	Buy	02/10/14	J		

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

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
	(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
120. Sizmek Inc. stock	A	Dividend	J	T	Buy (add'l)	04/28/14	J		
121. Sizmek Inc. stock	A	Dividend	J	T	Buy (add'l)	06/07/14	J		
122. Sizmek Inc. stock	A	Dividend	J	T	Buy (add'l)	10/16/14	J		
123. Covisint Corp. stock	A	Dividend	J	T	Buy	05/13/14	J		
124. Covisint Corp. stock	A	Dividend	J	T	Buy (add'l)	10/16/14	J		
125. Athabasca Oil Corp. stock	A	Dividend	J	T	Buy	06/16/14	J		
126. WCI CMNTYS Com stock	A	Dividend	J	T	Buy	07/14/14	J		
127. Enernac Inc. stock	A	Dividend	J	T	Buy	09/04/14	J		
128. Enernac Inc. stock	A	Dividend	J	T	Buy (add'l)	10/22/14	J		
129. Sandstorm Gold Limited Com NEW stock	A	Dividend	J	T	Buy	11/03/14	J		
130. Sandstorm Gold Limited Com NEW stock	A	Dividend	J	T	Buy (add'l)	12/16/14	J		
131. QEP Res Inc. stock	A	Dividend	J	T	Buy	12/23/14	J		
132. Vanguard Health Care Fund	A	Dividend	K	T	Buy	07/07/14	K		
133. Vanguard Long-Term Bond Index Fund	A	Dividend	K	T	Buy	07/07/14	K		
134. Vanguard Long-Term Tax-Exempt Fund	A	Dividend	K	T	Buy	07/07/14	K		
135. Vanguard Prime Money-Market Fund	A	Interest	J	T	Buy	06/26/14	M		
136. AT&T stock	A	Dividend	K	T	Buy	07/10/14	K		

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

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
	(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
137. Chevron Corporation. stock	A	Dividend	K	T	Buy	08/01/14	K		
138. Dominion Resources stock	A	Dividend	K	T	Buy	07/10/14	K		
139. PA Power & Light (PPL Corp.) stock	A	Dividend	K	T	Buy	07/10/14	K		
140. Roayl Dutch Shell stock	A	Dividend	K	T	Buy	07/31/14	K		
141. Verizon Communications Inc. stock	A	Dividend	K	T	Buy	07/10/14	K		

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

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

Part I. "Positions":

Filer is co-trustee of a testamentary trust [REDACTED].

Neither co-trustee is compensated and neither has any equitable interest whatsoever (remote, contingent, or otherwise) in the trust. Trust assets are all either shares in mutual funds or stock in Fortune 500 companies, as per lines 132-141 of Part VII of this Report and further explanation below.

Part VII. "Investments and Trusts":

Savings accounts and some investments automatically reinvest earnings, adding same to principal. Brokerage-related income is retained and reinvested.

Assets in lines 132-141 are assets held by the trust that is referenced above and in Part I of this report. Money-market fund (line 135) was initial repository of funds received from estate [REDACTED] in mid-2014; value of such fund after acquisition of other mutual funds and stocks is now negligible.

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IX. CERTIFICATION.

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

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

Signature: **s/ Robert N. ArmenJr.**

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

Committee on Financial Disclosure
Administrative Office of the United States Courts
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