

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2015

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) Marvel, L. Paige	2. Court or Organization United States Tax Court	3. Date of Report 11/10/2016
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Judge	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☒ Amended Report	6. Reporting Period 01/01/2015 to 12/31/2015
7. Chambers or Office Address UNITED STATES TAX COURT 400 SECOND STREET, 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.)

	<u>POSITION</u>	<u>NAME OF ORGANIZATION/ENTITY</u>
1.	Partner	Partnership #1
2.	Custodian	529 Acct. #4
3.	Trustee	REH Irrevocable Trust
4.	Trustee	LHH Revocable Trust
5.		

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

☒ NONE (No reportable agreements.)

	<u>DATE</u>	<u>PARTIES AND TERMS</u>
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.)*

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

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

<u>DATE</u>	<u>SOURCE AND TYPE</u>
1. 2015	Maryland State Retirement Agency distribution (457 Plan)
2. 2015	Maryland Teachers and State Employees distribution
3. 2015	Fidelity Rollover IRA distribution
4. 2015	RBC IRA distribution

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. ABA Section of Taxation	September 17-19, 2015	Chicago, IL	Speak at CLE Program	Travel, Lodging, Food, Parking
2. ABA National Institute on Tax Controversies	December 9-11, 2015	Las Vegas, Nevada	Speak at CLE Program	Travel, Lodging, Food, Parking
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.)*

	<u>SOURCE</u>	<u>DESCRIPTION</u>	<u>VALUE</u>
1.	Aspen Publishers	Complimentary copy, Mergers, Acquisitions & Buyouts, and update for prof. use	\$600.00
2.			
3.			
4.			
5.			

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

	<u>CREDITOR</u>	<u>DESCRIPTION</u>	<u>VALUE CODE</u>
1.	Washington University in St. Louis	Tuition Payment Plan Loan	K
2.	U.S. Dept. of Education	Student Loans	J
3.	Washington University in St. Louis	Student Loans	J
4.	Emory University	Student Loans	J
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. 33% pship. interest, Margaret's Landing Partnership		None	K	W					
2. USAA Subscribers Savings Account	B	Distribution	J	T					
3. USAA Fed. Savings Bank Accts. #1	A	Interest	J	T					
4. USAA Fed. Savings Bank Accts. #2	A	Interest	J	T					
5. M&T Bank accts. #1	A	Interest	J	T					
6. M&T Bank accts. #2	A	Interest	J	T					
7. T. Rowe Price Acct. (H):									
8. -Growth Stock Fund	D	Distribution	L	T	Buy (add'l)	12/14/15	J		
9. -Maryland Bond Fund	A	Dividend	J	T	Redeemed (part)	8/28/15	J		
10.					Redeemed (part)	09/24/15	J		
11. RBC Brokerage Acct. (H):									
12. -Shares, AT&T Inc.	A	Dividend	J	T					
13. -Common, Bristol Myers Squibb Co.	A	Dividend	K	T					
14. -Common, Centerpoint Energy Inc.	A	Dividend	J	T					
15. -Shares, Covidien PLC	A	Dividend			Merged (with line 20)	01/27/15	L	E	
16. -Common, Exxon Mobil Corp	C	Dividend	L	T					
17. -Common, Fresenius Med Care Aktiengesellschaft ADR	A	Dividend	K	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 ~\$250,000,001 - \$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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☐ NONE (No reportable income, assets, or transactions.)

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

18. -Common, General Electric Co.	A	Dividend	K	T					
19. -Shares, Mallinckrodt PLC		None	J	T					
20. -Common, Medtronic PLC	A	Dividend	K	T	Open	01/27/15	K		
21. -Shares, Pentair PLC	A	Dividend	J	T					
22. -Common, Pfizer Inc.	A	Dividend	J	T					
23. -Shares, PNC Financial Services Group, Inc.	A	Dividend	J	T					
24. -Shares, TE Connectivity Ltd.	A	Dividend	K	T					
25. -Shares, Tyco Intl PLC (name change)	A	Dividend	J	T					
26. -Shares, UDR Inc.	B	Dividend	K	T					
27. -Shares, Verizon Communications	A	Dividend	J	T					
28. -Shares, U.S. Govt. Money Mkt. Fund RBC Reserve Class	A	Dividend	J	T	Buy (add'l)	01/28/15	K		
29.					Sold (part)	01/22/15	J		
30.					Sold (part)	02/27/15	J		
31.					Sold (part)	03/20/15	J		
32.					Sold (part)	03/25/15	J		
33.					Sold (part)	04/04/15	J		
34.					Sold (part)	04/04/15	J		

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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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
	(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
35.					Sold (part)	04/08/15	J		
36.					Sold (part)	04/28/15	J		
37.					Sold (part)	04/04/15	J		
38.					Sold (part)	05/26/15	J		
39.					Sold (part)	06/01/15	J		
40.					Sold (part)	06/08/15	J		
41.					Sold (part)	06/08/15	J		
42.					Sold (part)	06/25/15	J		
43.					Sold (part)	07/23/15	J		
44.					Sold (part)	08/20/15	J		
45.					Sold (part)	09/22/15	J		
46.					Sold (part)	10/28/15	J		
47.					Sold (part)	11/30/15	J		
48.					Sold (part)	12/20/15	J		
49. Fidelity Brokerage Rollover IRA (H):									
50. -Fidelity New Markets Income	B	Dividend	K	T					
51. -Spartan 500 Index	B	Dividend	L	T					

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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	
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52.	A	Distribution							
53. -Fidelity Strategic Real Return	A	Dividend	J	T					
54. -Fidelity Contrafund	A	Dividend	M	T	Sold (part)	01/21/15	J	D	
55.	D	Distribution							
56. -Fidelity Equity-Income	B	Dividend	L	T					
57.	D	Distribution							
58. -Fidelity GNMA Fund	A	Dividend	K	T					
59. -Fidelity Total Bond	A	Dividend	K	T	Buy	12/03/15	K		
60. -Fidelity Government Income	A	Distribution	J	T					
61. -Fidelity New Millenium	A	Dividend	K	T					
62.	B	Distribution							
63. -Fidelity Low-Priced Stock	B	Dividend	M	T					
64.	C	Distribution							
65. -Fidelity Select Biotechnology	D	Distribution	L	T					
66. -Fairholme Fund	A	Dividend	K	T					
67.	D	Distribution							
68. -Oakmark Select I	A	Dividend	K	T					

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69. -Loomis Sayles Bond Retail Shares	A	Dividend	K	T					
70.	B	Distribution							
71. -Pimco Real Return Class D	A	Dividend	J	T					
72. -Permanent Portfolio	A	Dividend	J	T					
73.	A	Distribution							
74. -Vanguard Inflation Protected Secs.	A	Dividend	K	T					
75. -Wasatch Ultra Growth	A	Distribution	J	T					
76. -Wasatch International Growth		None	K	T					
77. -Common, Novocure LTD		None	J	T	Buy	10/15/15	J		
78. -Shares, Seaspan Corp.	A	Dividend	J	T					
79. -Shares, Berkshire Hathaway Inc. Cl B		None	K	T					
80. -CPFL Energia S A Sponsored ADR		Dividend			Sold	03/11/15	J		
81. -Shares, EMC Corp.	A	Dividend	J	T					
82. -Shares, First Tr ISE Chindia Index FD	A	Dividend	J	T					
83. -Shares, Goldman Sachs Group Inc.	A	Dividend	K	T					
84. -Common, Intrexon Corp.		None	J	T	Buy	02/26/15	J		
85. -Shares, Greenhaven Continuous Commodity Index Fund		None			Sold	07/29/15	J		

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86.	-ISHARES INC. MSSCI Bric Index Fund	A	Dividend			Sold	07/29/15	J	A	
87.	-ISHARES INC. MSCI Singapore Index FD	A	Dividend	J	T					
88.	-ISHARES INC. MSCI Malaysia Free Index FD		None			Sold	01/29/15	J	A	
89.	-JPMorgan Chase & Co. Alerian MLP Index ETN	A	Interest	J	T					
90.	-Common, Lundin Mng Corp.		None			Sold	01/29/15	J		
91.	-Shares, Potash Corp Sask Inc.		None			Sold	07/29/15	J		
92.	-Shares, Vale S A ADR		None			Sold	01/29/15	J		
93.	-Shares, Wisdomtree Emerg. Mkts Equity Income Fund	A	Dividend	J	T					
94.	-Common, Ziopharm Oncology		None	J	T	Spinoff (from line 84)	06/12/15	J		
95.	-Shares, Federal Realty Invst Tr. Sh. Ben. Int.	A	Dividend	J	T					
96.	-Shares, Kimco Realty Corp.	A	Dividend	J	T					
97.	-Fidelity Cash Reserves	A	Dividend	K	T	Buy (add'l)	01/21/15	J		
98.						Buy (add'l)	01/29/15	J		
99.						Sold (part)	03/03/15	J		
100.						Buy (add'l)	03/11/15	J		
101.						Buy (add'l)	08/03/15	J		
102.						Sold (part)	10/15/15	J		

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103.					Buy (add'l)	11/30/15	L		
104.					Sold (part)	12/03/15	K		
105. T.RowePrice Rollover IRA (H):									
106. -T. Rowe Price Capital Appreciation	B	Dividend	L	T	Buy (add'l)	07/17/15	J		
107.	D	Distribution							
108. -Rowe Price Emerging Markets Stock	A	Dividend	K	T					
109. -Rowe Price Equity Income	B	Dividend	L	T	Sold (part)	05/11/15	J	D	
110.	C	Distribution							
111. -Rowe Price Equity Index 500	B	Dividend	L	T	Sold (part)	05/11/15	J	C	
112. -Rowe Price Health Sciences	D	Distribution	L	T					
113. -Rowe Price International Discovery	A	Dividend	L	T					
114.	C	Distribution							
115. -Rowe Price Latin America		None			Sold (part)	07/17/15	J	A	
116.					Sold	10/08/15	J		
117. -Rowe Price Mid-Cap Value	A	Dividend	K	T					
118.	B	Distribution							
119. -Rowe Price New Asia	A	Dividend	K	T					

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2. Value Codes (See Columns C1 and D3)	J ~\$15,000 or less N ~\$250,001 - \$500,000 P3 ~\$25,000,001 - \$50,000,000	K ~\$15,001 - \$50,000 O ~\$500,001 - \$1,000,000	L ~\$50,001 - \$100,000 P1 ~\$1,000,001 - \$5,000,000 P4 ~More than \$50,000,000	M ~\$100,001 - \$250,000 P2 ~\$5,000,001 - \$25,000,000	
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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. -Rowe Price New Horizons	B	Distribution	K	T					
121. -Rowe Price Science & Technology	A	Distribution	J	T					
122. -Rowe Price Small-Cap Value	A	Dividend	K	T					
123.	D	Distribution							
124. -Rowe Price Emerging Markets Bond	B	Dividend	K	T					
125. -Rowe GNMA	A	Dividend	J	T					
126. -Rowe High Yield	B	Dividend	K	T					
127. -Rowe US Treasury Intermediate	A	Dividend	K	T					
128.	A	Distribution							
129. -Rowe Prime Reserve	A	Dividend	K	T	Buy	05/11/15	J		
130.					Buy (add'l)	10/08/15	J		
131. Fidelity Traditional IRA Acct. (H):									
132. -Shares, CNOOC Limited ADS EACH REP 100 ORD HKDO 02	A	Dividend	J	T					
133. -Common, Berkshire Hathaway		None	L	T					
134. -Shares, Seaspan Corporation	A	Dividend	J	T					
135. -Common, Vaalco Energy Inc.		None			Sold	01/23/15	J		
136. -Common, Intrexon Corp.		None	J	T	Buy	02/17/15	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.)

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period		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. -Common, Ziopharm Oncology Inc.		None	J	T	Spinoff (from line 136)	06/12/15	J		
138. -Dreyfus Opportunistic Midcap Value CL A Fund	C	Distribution	K	T					
139. -Teton Westwood Mighty Mites FD	A	Distribution	K	T					
140. -Fidelity Cash Reserves	A	Dividend	J	T	Buy (add'l)	01/23/15	J		
141.					Sold (part)	02/17/15	J		
142. RBC IRA Acct. (H):									
143. -Ishares Tr Nasdaq Biotech Index Fund	A	Dividend	J	T					
144. -Powershares QQQ Trust Unit Ser. 1	A	Dividend	J	T					
145. MD State Retirement Plan - Sec. 457(b) Acct. (H):					Closed	11/23/15	L		
146. -Shares, Euro Pacific Growth Fund A		Dividend			Sold	11/23/15	J	A	
147. -Shares, PIMCO Total Return Fund		Dividend			Sold	11/23/15	K		
148. -Shares, Vanguard Intl. Index Fund		Dividend			Sold	11/23/15	J		
149. IRA Accts. - American Century (H):					Closed	03/19/15	L		
150. -Equity Income Stock Fund		None			Buy (add'l)	02/10/15	J		
151.					Sold	03/19/15	K	D	
152. -Emerging Markets Stock Fund		None			Sold	03/19/15	K	C	
153. -CMG Focus Fund		None			Sold	02/10/15	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
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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. 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)
154. IRA Acct. - Greenspring Fund, Inc.	A	Dividend			Redeemed	08/31/15	K	E	
155.					Closed	08/31/15	K		
156. SEP Acct. - Greenspring Fund, Inc.	B	Dividend			Redeemed	10/05/15	K	E	
157.					Closed	10/05/15	K		
158. RBC Roth IRA (H):									
159. -Shares, Nationwide Mut Fds New Highmark Value FD (renamed)	A	Dividend			Sold	05/14/15	J	B	
160. -Shares, Factorshares Trust Purefunds ISE Cyber Security ETF		None		T	Buy	05/04/15	J		
161.					Sold (part)	10/08/15	J		
162. Vanguard Rollover IRA (H):									
163. -Shares, Convertible Securities	A	Dividend	K	T	Buy (add'l)	09/04/15	J		
164.	A	Distribution			Buy (add'l)	10/12/15	J		
165. -Shares, Dividend Growth Fund	B	Dividend	M	T	Buy (add'l)	03/20/15	K		
166.	C	Distribution			Buy (add'l)	03/20/15	K		
167. -Shares, Wellesley Income Fund	B	Dividend	L	T	Buy (add'l)	09/04/15	K		
168.	B	Distribution			Buy (add'l)	10/12/15	J		
169. RBC Joint Brokerage Acct. (H):									
170. -Common, Apple, Inc.	A	Dividend	K	T					

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2. Value Codes (See Columns C1 and D3)	J = \$15,000 or less N = \$250,001 - \$500,000 P3 = \$25,000,001 - \$50,000,000	K = \$15,001 - \$50,000 O = \$500,001 - \$1,000,000	L = \$50,001 - \$100,000 P1 = \$1,000,001 - \$5,000,000 P4 = More than \$50,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
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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)
171. -Common, Walt Disney Co.	A	Dividend	K	T					
172. -Common, Tesla Motors Inc.		None	J	T	Buy	04/06/15	J		
173. -US Govt. Money Market Fund RBC Reserve Class	A	Dividend	J	T	Sold (part)	04/06/15	J		
174. USAA Investment Acct. (H):									
175. -USAA Cornerstone Moderate Fund (formerly Balanced Str.)		None			Sold	03/31/15	J		
176. -USAA S&P 500 Index Fund	A	Dividend			Buy	05/11/15	J		
177.					Sold	09/14/15	J		
178. -USAA Value Fund	A	Dividend	J	T					
179.	A	Distribution							
180. RBC IRA/A Acct. (H):									
181. -Shares, Advent Claymore Conv Sec & Income Fund	B	Dividend	J	T					
182. -Shares, Alps ETF Tr Alerian MLP	B	Dividend	J	T					
183. -Common, Amgen Inc.	A	Dividend	K	T					
184. -Shares, BCE Inc. New	B	Dividend	K	T					
185. -Shares, Blackrock Global Energy and Resources Trust	B	Dividend	J	T					
186. -Shares, Factorshares Trust Purefunds ISE Cyber Security ETF		None	K	T	Buy	05/12/15	K		
187. -Common, Caterpillar Inc.	A	Dividend			Sold	06/26/15	K	E	

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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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	(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)
188. -Note, Citigroup Inc. 6.875% SER K DEP SHS REPSTG 1/1000TH INT	B	Int./Div.	K	T					
189. -Shares, Doubleline Opportunistic Credit Fund	B	Int./Div.	K	T	Buy	02/06/15	K		
190. -Shares, First Trust Preferred Securities & Income ETF	B	Dividend	K	T	Buy	11/05/15	K		
191. -Shares, Compass Diversified Trust	B	Int./Div.			Sold	05/12/15	K	C	
192. -Shares, Cushing Renaissance Fund	B	Dividend			Sold	05/12/15	J		
193. -Shares, Cushing Royalty & Income Fund	A	Dividend			Sold	06/26/15	K		
194. -Shares, Eaton Vance Tax Advantaged Dividend Income Fund	B	Dividend	K	T					
195. -Shares, Frontier Communications Corp Ser B		None			Sold	02/06/15	J	B	
196. -Common, General Electric Co.	A	Dividend	J	T					
197. -Shares, IShares International Select Dividend ETF	B	Dividend	K	T					
198. Shares, Kinder Morgan Inc.	B	Dividend	J	T					
199. -Note, Lowes Cos. Inc., Due 9/15/17, 6.1%	A	Interest	K	T					
200. -Shares, MFS Value Fund A	A	Dividend	K	T	Buy (add'l)	12/11/15	J		
201.	B	Distribution							
202. -Common, Microsoft Corp.	A	Dividend	K	T					
203. -Shares, Novartis A G ADR	A	Dividend	K	T					
204. -Common, Pepsico Incorporated	A	Dividend	K	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		
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205. -Common, Sysco Corporation	A	Dividend	J	T					
206. -Common, Under Armour Inc. CL A		None	J	T					
207. -Shares, Vanguard Intl. Eq. Index FDS Emerg. Markets Fund	A	Dividend	K	T					
208. -Shares, Vanguard Sector Index FDS - Vanguard Industrials ETF	B	Dividend	K	T					
209. -Shares, Vanguard Sect.Index FDS Information Technology ETF	B	Dividend	L	T					
210. -Common, Verizon Communications	A	Dividend	J	T					
211. -Shares Victory Portfolios Munder Growth Opportunities FD C	B	Distribution	J	T	Buy (add'l)	12/30/15	J		
212. -Common, Welltower Inc. (formerly Health Care REIT Inc.)	B	Dividend	K	T	Buy	09/09/15	K		
213. -Shares, US Govt. Money Market Fund (RBC)	A	Dividend	K	T	Buy (add'l)	01/02/15	J		
214.					Redeemed (part)	02/11/15	J		
215.					Redeemed (part)	05/15/15	K		
216.					Buy (add'l)	05/15/15	J		
217.					Buy (add'l)	07/01/15	L		
218.					Sold (part)	09/30/15	K		
219.					Sold (part)	11/10/15	K		
220. RBC IRA/B Acct. (H):									
221. -Common, AT&T Inc.	B	Dividend	K	T					

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

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222. -Shares, Blackrock Resources & Commodities Strategy Trust	A	Dividend			Sold	01/14/15	J		
223. -Common, Bristol Meyers Squibb Co.	A	Dividend	K	T					
224. -Common, Callaway Golf Co.		None			Sold	02/06/15	J		
225. -Shares, Cohen & Steers Infrastructure Fund Inc.	C	Dividend	K	T					
226. -Common, Eli Lilly & Co.	A	Dividend	K	T					
227. -Shares, Gabelli Dividend & Inc Trust	B	Dividend	K	T					
228. Shares, Gabelli Global Small & Mid Cap Value Tr Com		None	J	T					
229. -Common, General Mills, Inc.	A	Dividend	K	T					
230. -Common, Gladstone Commercial Corporation	B	Dividend	J	T					
231. -Common, Johnson & Johnson	A	Dividend	K	T					
232. -Common, Kinder Morgan Inc.	B	Dividend	J	T					
233. -Shares, Pembina Pipeline Corp.	A	Distribution	J	T					
234. -Shares, Pimco Dynamic Income Fund	D	Dividend	K	T					
235.	A	Distribution							
236. -Common, Under Armour Inc.		None	J	T	Buy	02/06/15	J		
237. -Shares, Vanguard World Funds- Vanguard Health Care ETF	A	Dividend	L	T					
238. -Shares, Vanguard REIT ETF	A	Dividend	K	T	Buy	01/15/15	K		

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(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		
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(See Column C2)	U = Book Value	V = Other	W = Estimated		

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239. -Shares Victory Portfolios Munder Growth Opportunities A	B	Distribution	J	T	Buy (add'l)	12/30/15	J		
240. -Shares, US Govt. Money Market Fund RBC Reserve Class	A	Dividend	K	T	Buy (add'l)	01/20/15	J		
241.					Redeemed (part)	01/21/15	K		
242.					Buy (add'l)	05/15/15	K		
243.					Redeemed (part)	05/15/15	K		
244.					Buy (add'l)	12/30/15	J		
245. Rollover IRA - USAA FSB (H):									
246. -Shares, USAA Value Fund	A	Dividend	J	T					
247. Vanguard Investment Acct. (H):									
248. -Shares, Inflation-Protect Sec Inv.	A	Dividend	J	T					
249. -Shares, Balanced Index Fund	A	Dividend	J	T	Sold (part)	03/06/15	J	A	
250. -Shares, Prime Money Mkt. Fund	A	Dividend	J	T	Buy	03/06/15	J		
251.					Buy (add'l)	03/06/15	J		
252.					Sold (part)	03/12/15	K		
253.					Sold (part)	12/31/15	J		
254. -Shares, Small-Cap Value Fund	A	Dividend	J	T					
255. -Shares, U.S. Growth Fund	A	Distribution	J	T	Sold (part)	03/06/15	J	A	

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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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)

256.	A	Dividend							
257. -Shares, iShares Technology ETF	A	Dividend	J	T	Buy	03/09/15	J		
258. -Shares, S&P Biotech ETF	A	Dividend			Buy	03/09/15	J		
259.					Sold	12/28/15	J		
260. Child No. 1 RBC Acct. (H):									
261. -Shares, Berkshire Hathaway CL B Inc.		None	K	T					
262. Child.No. 2 RBC Acct. (H):									
263. -Shares, Berkshire Hathaway CL B Inc.		None	K	T					
264. 529 Acct. - Vanguard (Child 1): Income Fund	A	Dividend	J	T					
265. REH Irrevocable Trust (H):									
266. - Fidelity Inherited IRA (H):									
267. --Shares, Fidelity Focused Stock Fund	A	Dividend	J	T					
268. --Shares, Fidelity Low Priced Stock Fund	A	Dividend	L	T					
269. --Fidelity Cash Reserves	A	Dividend	J	T					
270. -Promissory Note from Vicki A. Marvel, 6%	A	Interest	K	T					
271. -M&T Money Market Acct.	A	Interest	L	T					
272. LHH Revocable Trust (H):									

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)

273. --Fidelity Roth IRA (H):									
274. --Shares, Fidelity Contrafund	A	Distribution	K	T					
275. --Share, Fidelity Focused Stock Fund	A	Dividend	J	T					
276. --Shares, Fidelity Select Biotechnology	A	Dividend	J	T					
277. --M&T Money Market Acct.	A	Interest	M	T					
278. --TIC Fidelity Trust Acct (H):									
279. --Shares, Fidelity Municipal Inc.	B	Dividend	K	T					
280. --Shares, Fidelity Government Income	A	Dividend	J	T					
281. --Shares, Fidelity Intermediate Muni Income	A	Dividend	J	T					
282. --Fidelity Cash Reserves	A	Dividend	J	T					
283. --Bank of Oklahoma (BOO) Checking Acct.	A	Interest	J	T					

1. Income Gain Codes: (See Columns B1 and D4)	A --\$1,000 or less F --\$50,001 - \$100,000	B --\$1,001 - \$2,500 G --\$100,001 - \$1,000,000	C --\$2,501 - \$5,000 H1 --\$1,000,001 - \$5,000,000	D --\$5,001 - \$15,000 H2 --More than \$5,000,000	E --\$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	J --\$15,000 or less N --\$250,001 - \$500,000 P3 --\$25,000,001 - \$50,000,000	K --\$15,001 - \$50,000 O --\$500,001 - \$1,000,000	L --\$50,001 - \$100,000 P1 --\$1,000,001 - \$5,000,000 P4 --More than \$50,000,000	M --\$100,001 - \$250,000 P2 --\$5,000,001 - \$25,000,000	
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.)*

2015 Report, lines 145-157: My husband consolidated several of his retirement accounts during 2015. He arranged for the assets in each of the accounts shown on lines 145-157 to be sold, and then he transferred the cash balances to other existing IRA accounts (Fidelity and Vanguard) in order to simplify his holdings and better manage them. I have tried to describe these events accurately but, because there is no "transfer" action listed on the drop down menu, I showed several of the accounts in question as "Closed" on the header lines.

2015 Report generally: If assets appear that were not listed on my 2014 Amended Report and there is no explanation for how they got on the form, it is usually because the asset increased in value and I did not insert the obligatory (X) or (Y). I can never seem to report the ebb and flow in asset value correctly and have decided to include everything except the most de minimus of assets.

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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/ L Paige Marvel

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)

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