

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) Wells, Thomas B.	2. Court or Organization U.S. Tax Court	3. Date of Report 05/13/2015
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Judge (Senior Status)	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 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	Urban Properties, a GA Gen. Partnership to own and rent property located in Atlanta, GA, 12/78 to Present (essentially
2.	a real estate investment, see Part VII, Item 10, Line 10).
3. Member/Manager	MKWM Properties, LLC, a NC limited liability company to own and rent property located in Asheville, NC, 7/14/13 to present
4.	(essentially a real estate investment, see Part VII, Item 70, line 126.
5. Trustee	*See explanation in Part VIII. See Part VII, Item 71, line 128.

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.	

FINANCIAL DISCLOSURE REPORT

Page 2 of 13

Name of Person Reporting

Wells, Thomas B.

Date of Report

05/13/2015

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. _____

Name of Person Reporting	Date of Report
Wells, Thomas B.	05/13/2015

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.		

FINANCIAL DISCLOSURE REPORT

Page 4 of 13

Name of Person Reporting

Wells, Thomas B.

Date of Report

05/13/2015

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. 1. ☐ Brown Shoe Com.	A	Dividend	J	T					
2. 2. ☐ CSX, Com.	A	Dividend	L	T					
3. 3. ☐ Chevron, Com.	D	Dividend	N	T					
4. 4. ☐ Coca Cola, Com.	E	Dividend	O	T					
5. 5. ☐ Exxon, Mobil, Com.	B	Dividend	L	T					
6. 6. ☐ IBM, Com.	A	Dividend	L	T					
7. 7. ☐ Johnson & Johnson, Com.	C	Dividend	M	T					
8. 8. ☐ AGL Resources, Com.	B	Dividend	K	T					
9. 9. ☐ XOMA, Com.	A	Dividend	J	T					
10. 10. ☐ Urban Properties, GA Gen P'ship (1/2 int.)	D	Rent	N	W					
11. owns & rents property located in Atlanta, GA									
12. 11. ☐ C.D., Vidalia Federal S&L	E	Interest	P1	T					
13. 12. ☐ Cash Mgt. Acct. Merrill Lynch Bank USA.	E	Dividend	M	T					
14. 13. ☐ Merrill Lynch Retirement Reserves CL1 Fund (IRA).	A	Dividend	L	T					
15. 14. ☐ Allstate, Com.	A	Dividend	J	T					
16. 15. ☐ Mineral interest, Midland County, TX (Apache)	E	Royalty	K	W					
17. 16. ☐ Mineral interest, Andrews County, TX (BOPCO)	B	Royalty	K	W					

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	
3. Value Method Codes	P3 = \$25,000,001 - \$50,000,000		P4 = More than \$50,000,000		
(See Column C2)	Q = Appraisal	R = Cost (Real Estate Only)	S = Assessment	T = Cash Market	
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FINANCIAL DISCLOSURE REPORT

Page 5 of 13

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18. 17. ☐ Mineral interest, Rio Arriba County, TX (CONOCO)	E	Royalty	K	W					
19. 18. ☐ Mineral interest, Creek County, OK (Cornelius)	A	Royalty	J	W					
20. 19. ☐ Mineral interest, Midland County, TX (COG)	A	Royalty	J	W					
21. 20. ☐ Mineral interest, Midland and Glasscock Counties, TX (Endeavor)	B	Royalty	J	W					
22. 21. ☐ Mineral interest, Midland County, TX (Enterprise)	B	Royalty	J	W					
23. 22. ☐ Mineral interest, Rio Arriba County, TX (Harrington SW)	A	Royalty	J	W					
24. 23. ☐ Mineral interest, McClain County, OK (Jolen)	A	Royalty	J	W					
25. 24. ☐ Mineral interest, Andrews and Midland Counties, TX (Legacy)	E	Royalty	K	W					
26. 25. ☐ Mineral interest, Marion County, TX (LODI)	A	Royalty	J	W					
27. 26. ☐ Mineral interest, McClain County, OK (ONEOK)	A	Royalty	J	W					
28. 27. ☐ Mineral interest, Upton, Midland, Glasscock Co.s, TX (Pioneer)	D	Royalty	J	W					
29. 28. ☐ Mineral interest, Midland County, TX (Plains Mktg.)	D	Royalty	J	W					
30. 29. ☐ Mineral interest, Midland County, TX (SM Energy)	A	Royalty	J	W					
31. 30. ☐ Mineral interest, Okmulgee and Montague Counties, TX (Sunoco)	A	Royalty	J	W					
32. 31. ☐ Mineral interest, Escambia County, AL (Texas Petrol.)	A	Royalty	J	W					
33. 32. ☐ Mineral interest, Andrews County, TX (Vanguard)	B	Royalty	J	W					
34. 33. ☐ Mineral interest, Midland County, TX (Wagner)	A	Royalty	J	W					

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FINANCIAL DISCLOSURE REPORT

Page 6 of 13

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35. 34. [REDACTED] Lance, Com.	A	Dividend	J	T					
36. 35. Lance, Com.	A	Dividend	J	T					
37. 36. [REDACTED] AGL Resources, Com.	D	Dividend	M	T					
38. 37. [REDACTED] Morgan Stanley, Com.	A	Dividend	J	T					
39. 38. [REDACTED] Coca Cola, Com.	A	Dividend	K	T					
40. 39. [REDACTED] B.P. PLC, ADR	D	Dividend	M	T					
41. 40. [REDACTED] Dominion Resources, Com.	D	Dividend	M	T					
42. 41. [REDACTED] SunTrust Bank, Account	B	Interest	K	T					
43. 42. [REDACTED] Abbott Lab., Com.	A	Dividend	J	T					
44. 43. [REDACTED] Amgen, Com.	A	Dividend	J	T					
45. 44. [REDACTED] Campbell Soup, Com.	A	Dividend	J	T					
46. 45. [REDACTED] Cisco Systems, Com.	A	Dividend	J	T					
47. 46. [REDACTED] G.E., Com.	A	Dividend	J	T					
48. 47. [REDACTED] Home Depot, Com.	A	Dividend	J	T					
49. 48. [REDACTED] Intel, Com.	A	Dividend	J	T					
50. 49. [REDACTED] American Funds, Investment Co. of America Fund	A	Dividend	J	T					
51. 50. [REDACTED] Merck, Com.	A	Dividend	J	T					

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FINANCIAL DISCLOSURE REPORT

Page 7 of 13

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Wells, Thomas B.

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52. 51. ☐ Microsoft, Com.	A	Dividend	J	T					
53. 52. ☐ Pepsi Co., Com.	A	Dividend	J	T					
54. 53. ☐ Southern Co., Com.	A	Dividend	J	T					
55. 54. ☐ Disney, Com.	A	Dividend	J	T					
56. 55. ☐ Wells Fargo, Com.	A	Dividend	J	T					
57. 56. ☐ Verizon, com.	B	Dividend	K	T					
58. 57. ☐ Gum Swamp Creek, LLC, (units of ownership in Georgia limited liability company)	F	Distribution	P1	W					
59. -AGL RESOURCES, com.									
60. -ALCATEL LUCENT ADR									
61. -AT&T CORP, com.									
62. -AMER. ELEC. PWR., com.									
63. -B.P. PLC, ADR.									
64. -CONOCO PHILLIPS, com.									
65. -CITIGROUP INC, com.									
66. -COCA COLA, com.									
67. -COMCAST CORP. New CL A, com.									

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FINANCIAL DISCLOSURE REPORT

Page 8 of 13

Name of Person Reporting

Wells, Thomas B.

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69. -DAIMLER A., com.									
70. -DEVON ENERGY, com.									
71. -DIRECT T.V. GRP, Holdings, CLA									
72. -EXXON MOBIL CORP, com.									
73. -FORD MOTOR CO., com.									
74. -GENERAL ELECTRIC, com.									
75. -HOME DEPOT, com.									
76. -INTL PAPER CO, com.									
77. - MARATHON OIL CORP, com.									
78. -MATTEL INC, com.									
79. -NCR CORP, com.									
80. -NEWMONT MINING, com.									
81. -NORFOLK SO., com.									
82. -NORTHROP GRUMMAN, com.									
83. -SCANA, com.									
84. -SOUTHERN CO, com.									
85. -TENNECO AUTO, com.									

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FINANCIAL DISCLOSURE REPORT

Page 9 of 13

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86. -TERADATA, com.									
87. -UNITED STS STL, com.									
88. -V F CORP, com.									
89. -WCMA Money Fund CL3									
90. -Vidalia Federal Savings Bank, C.D.									
91. -Vidalia Federal Savings Bank, Checking									
92. -Real estate, Toombs Co., GA									
93. - Real estate, Dodge Co., GA									
94. - Real estate, Vidalia, GA									
95. - Real estate, Telfair Co., GA									
96. - Real estate, Wheeler Co., GA, parcel #1									
97. - Real estate, Wheeler Co., GA, parcel #2									
98. -Bond, GA ST HFA, 6/1/12					Redeemed	06/01/14	K	A	
99. -Bond, SAV GA EC DEV., 12/1/16									
100. -Bond, ATL GA DEV., 9/1/17									
101. -Bond, Barrow Co., 10/1/16									
102. -Berkshire Hathaway, B com.									

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FINANCIAL DISCLOSURE REPORT

Page 10 of 13

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103. -Century Link, com.									
104. -Huntington Incls., com.									
105. -Marathon Petrol., com.									
106. -Ingredion, com.									
107. -Kinder Morgan, com.									
108. -Energy Transfer Partners, com.									
109. -Suncoke, com.									
110. -Phillips 66, com.									
111. -Twenty First Cent., com.									
112. 58. ☐ Acco Brands, com.	A	Dividend	J	T					
113. 59. ☐ Hospira, Com.	A	Dividend	J	T					
114. 60. ☐ Real Estate in Charlottesville, VA	E	Rent	N	W					
115. 61. ☐ Alcatel Lucent, ADR	A	Dividend	J	T					
116. 62. ☐ Delta Airlines, Com.	A	Dividend	K	T					
117. 63. ☐ Discover Fin. Serv., Com.	A	Dividend	J	T					
118. 64. ☐ Teradata Corp., Com.	A	Dividend	J	T					
119. 65. ☐ Tall Timber Ventures, LLC (units of ownership in	E	Distribution	O	W					

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FINANCIAL DISCLOSURE REPORT

Page 11 of 13

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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)
120. Georgia limited liability company) Owns units in Gum Swamp									
121. Creek, LLC									
122. 66. Fortune Brands Home Sec., com.	A	Dividend	J	T					
123. 67. Beam, Inc., com.	B	Dividend	K	T	Sold	01/05/14	K	E	
124. 68. Express Scripts Hldg., com	A	Dividend	J	T					
125. 69. Abbvie, com.	A	Dividend	K	T					
126. 70. MKWM Properties, LLC	D	Rent	N	W					
127. -Real estate, Asheville, NC									
128. 71. Trust #1 (X)									

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	

FINANCIAL DISCLOSURE REPORT

Page 12 of 13

Name of Person Reporting

Wells, Thomas B.

Date of Report

05/13/2015

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

*Part I. Positions for line 5. Trustee

Trust #1 is a trust that owns a whole life insurance policy on the life of a [REDACTED] member of Reporting Person. Trust #1 is for the benefit of [REDACTED] members of Reporting Person (but not the reporting person's [REDACTED]). Trust #1 is being terminated pursuant to a court order appointing Reporting Person as sole Trustee and is distributing the insurance policy to those [REDACTED] members. The Reporting Person is not compensated and is not entitled to compensation as Trustee. Trust #1 was created prior to the Reporting Person's appointment to current judicial position, and the Co-Trustee of Trust #1 handled all matters relating to Trust #1 until the Co-Trustee was no longer able to act for Trust #1; Reporting Person was unaware Trust #1 remained in existence until after Co-Trustee could no longer act as Co-Trustee.

(See Part VII, Item 71, Line 128).

FINANCIAL DISCLOSURE REPORT

Page 13 of 13

Name of Person Reporting

Wells, Thomas B.

Date of Report

05/13/2015

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 B. Wells**

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
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