

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2011

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) Gerber, Joel	2. Court or Organization United States Tax Court	3. Date of Report 04/09/2012
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Senior Judge	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2011 to 12/31/2011
7. Chambers or Office Address 400 2nd Street, N.W., Room 418 Washington, D.C. 20217		
IMPORTANT NOTES: The instructions accompanying this form must be followed. Complete all parts, checking the <i>NONE</i> box for each part where you have no reportable information. Insert signature on last page.		

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. Director	Tannenwal Foundation
2.	
3.	
4.	
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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Name of Person Reporting

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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. Jan.-Dec. _____

- U.S. Treasury Department - Retirement Annuity

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.)*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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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. Gold Coins		None	J	T					
2. Dearn Wotter (Morgan Stanley) Common Stock	A	Dividend	J	T					
3. Lucent Common (Alcatel)		None	J	T					
4. Microsoft Common	A	Dividend	J	T					
5. General Electric Common	A	Dividend	J	T					
6. Time Warner Common (Formerly AOL)	A	Dividend	J	T					
7. Nasdaq 100 Trust QQQ	A	Dividend	J	T					
8. Cisco Systems Common	A	Dividend	J	T					
9. Blackrock Balanced Investment		None			Sold	03/30/11	J	A	
10. MSW Divident Growth (Investco)		None			Sold	03/30/11	J	A	
11. Ing Annuity (X)		None	N	T					
12. Janis Mid Cap Fund	C	Distribution	J	T					
13. Third Avenue Value Fund		None			Sold	03/30/11	J	A	
14. Citibank Checking	A	Interest	K	T					
15. Citibank Money Market Checking	A	Interest	L	T					
16. Third Avenue Fund		None			Sold	02/04/11	K	A	
17. Discover Financial Services	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 H ~\$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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18. Kinetics Paradigm Fund		None			Sold	02/04/11	K	A	
19. Janis Mid Cap Fund	A	Dividend	J	T					
20. T. D. Ameritrade Mney Mkt	A	Int./Div.	L	T					
21. TDAX FDS, Inc	A	Dividend	J	T					
22. Cadence Pharmaceuticals		None	J	T					
23. Alps Services Brown Cam Small Co Fd 1		None	J	T	Buy	04/04/11	J		
24. Artio Fds International Equity II A	A	Dividend	J	T	Buy	04/04/11	J		
25.					Sold (part)	07/12/11	J	A	
26.					Sold (part)	10/10/11	J	A	
27. Artisan Fds Inc Mid Cap Value Fd	A	Dividend	J	T	Buy	04/04/11	J		
28.					Sold (part)	10/10/11	J	A	
29. Berwyn Fd Inc Comm	A	Dividend	J	T	Buy	04/04/11	J		
30. Buffalo Fds Mid Cap		None	J	T	Buy	04/04/11	J		
31.					Sold (part)	07/11/11	J	A	
32.					Buy (add'l)	10/10/11	J		
33.					Buy (add'l)	12/12/11	J		
34. Credit Suisse Fds Commodity Return Strategy Com		None	J	T	Buy	04/04/11	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	
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35.					Buy (add'l)	07/12/11	J		
36.					Sold (part)	10/10/11	J	A	
37.					Buy (add'l)	12/19/11	J		
38. Dodge & Cox Fds Intl Stk Fd	A	Dividend	J	T	Buy	04/04/11	J		
39.					Sold (part)	10/10/11	J	A	
40. Dodge & Cox Funds Stk Fd	A	Dividend	J	T	Buy	04/04/11	J		
41. Harbor Fd Bd Fd Instl	A	Dividend	J	T	Buy	04/04/11	J		
42.					Sold (part)	07/11/11	J	A	
43. Janus Perkins Midcp VI Inv T	A	Dividend	J	T	Buy	04/04/11	J		
44.					Sold (part)	10/10/11	J	A	
45. Jensen Portfolio Inc Com	A	Dividend	J	T	Buy	04/04/11	J		
46. Metro West Fds Total Return Bd Fd	A	Dividend	J	T	Buy	04/04/11	J		
47.					Sold (part)	07/11/11	J	A	
48. Northern Fds Small Cap Fd	A	Dividend	J	T	Buy	04/04/11	J		
49.					Sold (part)	07/11/11	J	A	
50. Nottingham Invt Tr-11 Brown Cap Small Co Instl	A	Dividend			Buy	04/04/11	J		
51.					Sold	07/11/11	J	A	

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52. Pimco Real Return Fd CL D	A	Dividend	J	T	Buy	04/04/11	J		
53.					Sold (part)	07/11/11	J	A	
54.					Sold (part)	10/10/11	J	A	
55. Price T. Rowe High Yield Fd I Com	A	Dividend	J	T	Buy	04/04/11	J		
56.					Sold (part)	10/11/11	J	A	
57. Rowe T. Price Equity Income F Sh Ben Int	A	Dividend	J	T	Buy	04/04/11	J		
58. Rowe T. Price New Am Growth F Sh Ben Int	A	Dividend	J	T	Buy	04/04/11	J		
59.					Sold (part)	07/11/11	J	A	
60.					Sold (part)	10/11/11	J	A	
61. Royce Microcap Investment Cl	A	Dividend	J	T	Buy	04/04/11	J		
62. SSGA Fds Emerging Mkt	A	Dividend	J	T	Buy	04/04/11	J		
63. T Rowe Real Estate Fd	A	Dividend	J	T	Buy	04/04/11	J		
64.					Sold (part)	07/11/11	J	A	
65. T Rowe Price Intl Bd Fd	A	Dividend	J	T	Buy	04/04/11	J		
66.					Sold (part)	07/11/11	J	A	
67.					Sold (part)	10/11/11	J	A	
68. T Rowe Price Intl Emerg Mkts Stk		None	J	T	Buy	04/04/11	J		

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69.					Sold (part)	10/11/11	J	A	
70. Templeton Income Tr Global Bond Advisor	A	Dividend	J	T	Buy	10/10/11	J		
71. Thornburg Interntl Value Inst	A	Dividend	J	T	Buy	04/04/11	J		
72.					Sold (part)	07/11/11	J	A	
73. Turner Fds Midcap Fd Instl Cl		None	J	T	Buy	04/04/11	J		
74.					Sold (part)	07/11/11	J	A	
75. Artio Fds International Equity II A		None			Buy	04/06/11	J		
76.					Sold (part)	07/11/11	J	A	
77.					Sold	10/10/11	J	A	
78. Artisan Fed Inc Mid Cap Value Fd		None			Buy	04/06/11	J		
79.					Buy (add'l)	07/11/11	J		
80.					Sold	10/10/11	J	A	
81. Aips Fund Services Brown Sm I See		None	J	T	Buy	04/06/11	J		
82.					Buy (add'l)	10/10/11	J		
83.					Sold (part)	07/11/11	J	A	
84. Buffalo Fds Mid Cap Fd		None	J	T	Buy	04/06/11	J		
85.					Buy (add'l)	10/10/11	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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86.					Buy (add'l)	12/21/11	J		
87.					Sold (part)	07/11/11	J	A	
88. Credit Suisse Funs Commodity		None	J	T	Buy	04/06/11	J		
89.					Buy (add'l)	07/11/11	J		
90.					Buy (add'l)	10/10/11	J		
91.					Buy (add'l)	12/19/11	J		
92. Dodge & Cox Funds Intl Stk Fd	A	Dividend	J	T	Buy	04/06/11	J		
93.					Buy (add'l)	10/10/11	J		
94. Dod & Cox Funds Stock Fd	A	Dividend	J	T	Buy	04/06/11	J		
95.					Buy (add'l)	10/10/11	J		
96. Harbor Fd Bd Fd Instl	A	Dividend	J	T	Buy	04/06/11	J		
97.					Buy (add'l)	10/10/11	J		
98.					Sold (part)	07/11/11	J	A	
99. Janus Perkins Mid Cap VL Inv T	A	Dividend	J	T	Buy	04/06/11	J		
100. Janus Short Term Bd T	A	Dividend	J	T	Buy	04/06/11	J		
101.					Sold (part)	07/11/11	J	A	
102.					Sold (part)	10/10/11	J	A	

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103. Jensen Quality Growth J	A	Dividend	J	T	Buy	04/06/11	J		
104.					Buy (add'l)	07/11/11	J		
105.					Buy (add'l)	10/10/11	J		
106. Metropolitan West Total Return	A	Dividend	J	T	Buy	04/06/11	J		
107.					Sold (part)	07/11/11	J	A	
108.					Sold (part)	10/10/11	J	A	
109. Northern Fds Small Cap Fd	A	Dividend	J	T	Buy	04/06/11	J		
110.					Buy (add'l)	10/10/11	J		
111. Pimco Real Return Fd Cl D	A	Dividend	J	T	Buy	04/06/11	J		
112.					Sold (part)	07/11/11	J	A	
113.					Sold (part)	10/10/11	J	A	
114. Price T Rowe High Yield Fd 1 Com	A	Dividend	J	T	Buy	04/06/11	J		
115.					Buy (add'l)	07/11/11	J		
116.					Sold (part)	10/10/11	J	A	
117. Rowe T Price Equity Inc F Sh Ben	A	Dividend	J	T	Buy	04/06/11	J		
118.					Buy (add'l)	10/10/11	J		
119. Rowe T Price New Am Growth F Sh	A	Dividend	J	T	Buy	04/06/11	J		

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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)
120.					Sold (part)	07/11/11	J	A	
121. Rowe T Price Short Term Bd F Com	A	Dividend	J	T	Buy	04/06/11	J		
122.					Sold (part)	07/11/11	J	A	
123.					Sold (part)	10/10/11	J	A	
124. SSGA Fds Emerging Mkt	A	Dividend	J	T	Buy	04/06/11	J		
125.					Buy (add'l)	10/10/11	J		
126. T Rowe Price Intl Emerging Mkts	A	Dividend			Buy	07/11/11	J		
127.					Sold	10/10/11	J	A	
128. T Rowe Price Intl Intl Bd Fd	A	Dividend	J	T	Buy	04/06/11	J		
129.					Sold (part)	07/11/11	J	A	
130.					Sold (part)	10/10/11	J	A	
131. T Rowe Price Real Estate Fd	A	Dividend	J	T	Buy	04/06/11	J		
132.					Buy (add'l)	10/10/11	J		
133.					Sold (part)	07/11/11	J	A	
134. Templeton Income Tr Global Bond	A	Dividend	J	T	Buy	04/06/11	J		
135.					Buy (add'l)	10/10/11	J		
136. Thornburg Interntl Value Inst	A	Dividend	J	T	Buy	04/06/11	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)
137.					Buy (add'l)	10/10/11	J		
138. Turner Fds Midcap Fd Instl C1		None			Buy	04/06/11	J		
139.					Sold (part)	07/11/11	J	A	
140.					Sold	10/10/11	J	A	
141. Artio Fds		None			Buy	04/06/11	J		
142.					Buy (add'l)	07/11/11	J		
143.					Sold	10/10/11	J	A	
144. Artisan Fds Inc Mid Cap Value Fd	A	Dividend	J	T	Buy	04/06/11	J		
145. ALPS Fund Services Brown Sm 1 SEE		None	J	T	Buy	04/06/11	J		
146.					Buy (add'l)	10/10/11	J		
147.					Sold (part)	07/11/11	J	A	
148. Berwin Fd Inc. Com	A	Distribution	J	T	Buy	04/06/11	J		
149. Buffalo Fds Mid Cap Fd		None	J	T	Buy	04/06/11	J		
150.					Buy (add'l)	10/10/11	J		
151.					Buy	12/21/11	J		
152.					Sold (part)	07/11/11	J	A	
153. Credit Suisse Funds Commodity	A	Distribution	J	T	Buy	04/06/11	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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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. 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.					Buy (add'l)	07/11/11	J		
155.					Buy (add'l)	10/10/11	J		
156.					Buy (add'l)	12/21/11	J		
157. Dodge & Cox Funds International Stock Fund	A	Dividend	J	T	Buy	04/06/11	J		
158.					Buy (add'l)	10/10/11	J		
159.					Sold (part)	07/11/11	J	A	
160. Dodge & Cox Funds Stock Fund	A	Dividend	J	T	Buy	04/06/11	J		
161.					Buy (add'l)	07/11/11	J		
162.					Buy (add'l)	10/10/11	J		
163. Harbor Fd Bd Fd Instl	A	Dividend	J	T	Buy	04/06/11	J		
164.					Buy (add'l)	07/11/11	J		
165.					Sold (part)	10/10/11	J	A	
166. Janus Perkins Mid Cp VI Inv T	A	Dividend	J	T	Buy	04/06/11	J		
167. Janus Short Term Bd T	A	Dividend	J	T	Buy	04/06/11	J		
168.					Sold (part)	07/11/11	J	A	
169.					Sold (part)	10/10/11	J	A	
170. Jensen Quality Growth J	A	Dividend	J	T	Buy	04/06/11	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)
171.					Buy (add'l)	07/11/11	J		
172.					Buy (add'l)	10/10/11	J		
173. Metropolitan West Total Return	A	Dividend	J	T	Buy	04/06/11	J		
174.					Buy (add'l)	07/11/11	J		
175.					Sold (part)	10/10/11	J	A	
176. Northern FDS Small Cap Fd	A	Dividend	J	T	Buy	04/06/11	J		
177.					Sold (part)	10/10/11	J	A	
178. Pimco Real Return Fd Cl D	A	Dividend	J	T	Buy	04/06/11	J		
179.					Sold (part)	07/11/11	J	A	
180.					Sold (part)	10/10/11	J	A	
181. Price T Rowe High Yield Fd I Com	A	Dividend	J	T	Buy	04/06/11	J		
182.					Buy (add'l)	07/11/11	J		
183.					Sold (part)	10/10/11	J	A	
184. Rowe T Price Equity Income F Sh Ben	A	Dividend	J	T	Buy	04/06/11	J		
185.					Buy (add'l)	07/11/11	J		
186.					Buy (add'l)	10/10/11	J		
187. Rowe T Price New Am Growth F Sh	A	Dividend	J	T	Buy	04/06/11	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 \$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)
188.					Buy (add'l)	10/10/11	J		
189.					Sold (part)	07/11/11	J	A	
190. Rowe T Price Short Term Bd F Com	A	Dividend	J	T	Buy	04/06/11	J		
191.					Sold (part)	07/11/11	J	A	
192.					Sold (part)	10/10/11	J	A	
193. Royce Midcap Investments Cl		None			Buy	04/06/11	J		
194.					Buy (add'l)	07/11/11	J		
195.					Sold	10/10/11	J	A	
196. SSGA Fds Emerging Mkt	A	Dividend	J	T	Buy	04/06/11	J		
197. T Rowe Price Intl Emerg Mkts Stk	A	Dividend	J	T	Buy	04/06/11	J		
198.					Buy (add'l)	07/11/11	J		
199.					Buy (add'l)	10/10/11	J		
200. T Rowe Price Intl Intl Bd Fd	A	Dividend	J	T	Buy	04/06/11	J		
201.					Sold (part)	07/11/11	J	A	
202.					Sold (part)	10/10/11	J	A	
203. T Rowe Real Estate Fd	A	Dividend	J	T	Buy	04/06/11	J		
204.					Sold (part)	07/11/11	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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Gerber, Joel

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04/09/2012

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. 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)
205. Templeton Income Tr Global Bond	A	Dividend	J	T	Buy	10/10/11	J		
206. Thornburg Interntl Value Inst	A	Dividend	J	T	Buy	04/06/11	J		
207.					Sold (part)	07/11/11	J	A	
208. Turner FDS Midcap Fd Instl Cl		None	J	T	Buy	04/06/11	J		
209.					Buy (add'l)	10/10/11	J		
210.					Sold (part)	07/11/11	J	A	

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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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.)*

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Gerber, Joel

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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/ Joel Gerber**

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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One Columbus Circle, N.E.
Washington, D.C. 20544