

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2019

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) Goeke, Joseph R.	2. Court or Organization United States Tax Court	3. Date of Report 09/14/2020
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	6. Reporting Period 01/01/2019 to 12/31/2019
5b. ☒ Amended Report		
7. Chambers or Office Address 400 Second Street, N.W. Room 410 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.		
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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Name of Person Reporting

Goeke, Joseph R.

Date of Report

09/14/2020

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.)

DATE

SOURCE AND TYPE

INCOME
(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.)

DATE

SOURCE 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.)

SOURCE

DATES

LOCATION

PURPOSE

ITEMS PAID OR PROVIDED

1.				
2.				
3.				
4.				
5.				

Name of Person Reporting	Date of Report
Goeke, Joseph R.	09/14/2020

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.		

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)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
1. Ishares MBS ETF	A	Dividend	K	T	Buy (add'l)	03/19/19	J		
2. St. Mary's County Bonds (2032)	A	Interest	L	T					
3. Vanguard Intermediate Term Bond ETF	A	Interest	J	T	Buy (add'l)	01/16/19	J		
4. Capital One Accounts	A	Interest	K	T					
5. Citibank Accounts	A	Interest	K	T					
6. Proctor & Gamble - common stock	E	Dividend	O	T	Buy (add'l)	08/20/19	K		
7. Nestle SA Shares	D	Dividend	K	T					
8. Franklin Fed Tax-Free Income Fund	E	Interest	N	T					
9. Royal Dutch Shell PLC	A	Dividend	J	T					
10. NYC General Purpose Bonds	A	Interest	K	T					
11. Oregon School Bonds	A	Interest	M	T					
12. Euro Pac Growth Fund	E	Dividend	K	T					
13. AT&T Inc. - senior notes	A	Interest	K	T					
14. FICO - Bonds	B	Interest	L	T					
15. Resolution FDG Corp. - Fed Bonds	A	Interest	J	T					
16. U.S. Treasury - Bonds	B	Interest	K	T					
17. Metlife -Bonds	B	Interest	L	T					

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

(See Column C2)

A =\$1,000 or less

F =\$50,001 - \$100,000

J =\$15,000 or less

N =\$250,001 - \$500,000

P3 =\$25,000,001 - \$50,000,000

Q =Appraisal

U =Book Value

B =\$1,001 - \$2,500

G =\$100,001 - \$1,000,000

K =\$15,001 - \$50,000

O =\$500,001 - \$1,000,000

R =Cost (Real Estate Only)

V =Other

C =\$2,501 - \$5,000

H1 =\$1,000,001 - \$5,000,000

L =\$50,001 - \$100,000

P1 =\$1,000,001 - \$5,000,000

P4 =More than \$50,000,000

S =Assessment

W =Estimated

D =\$5,001 - \$15,000

H2 =More than \$5,000,000

M =\$100,001 - \$250,000

P2 =\$5,000,001 - \$25,000,000

T =Cash Market

E =\$15,001 - \$50,000

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)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
18. Wells Fargo CD	B	Interest	K	T					
19. Smuckers stock	A	Dividend	J	T					
20. Barclay Bank PLC - Bonds	A	Interest	K	T					
21. Fed Natl Mtge Assn - Bonds	A	Interest	K	T	Redeemed (part)	10/09/19	J		no gain or loss
22. Cohen & Stearns Intl - Bonds	A	Interest	J	T					
23. Darby Bank - CD	A	Interest	K	T					
24. Verizon Bonds due 2047	A	Interest	L	T					
25. Great Hall - S7P Investment Funds	A	Interest	K	T					
26. Harris PFD Capital Corp. - Pref stks	B	Interest	K	T					
27. UIT Guggenheim defined portfolio	A	Interest	L	T	Buy (add'l)	08/20/19	K		
28. Prudential PLC - Bonds	B	Interest			Redeemed	08/22/19	K		no gain or loss
29. Southwestern Bank	A	Interest	K	T					
30. Bank of America - Bonds	A	Interest	M	T					
31. Salisbury MD GO Bonds (2029)	A	Interest	K	T					
32. Montgomery County MD bonds (2034)	A	Interest	K	T					
33. Transportation Alliance - CD	B	Interest	L	T					
34. Growth Fund of America	A	Dividend	J	T					

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

(See Column C2)

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U =Book Value

B =\$1,001 - \$2,500

G =\$100,001 - \$1,000,000

K =\$15,001 - \$50,000

O =\$500,001 - \$1,000,000

R =Cost (Real Estate Only)

V =Other

C =\$2,501 - \$5,000

H1 =\$1,000,001 - \$5,000,000

L =\$50,001 - \$100,000

P1 =\$1,000,001 - \$5,000,000

P4 =More than \$50,000,000

S =Assessment

W =Estimated

D =\$5,001 - \$15,000

H2 =More than \$5,000,000

M =\$100,001 - \$250,000

P2 =\$5,000,001 - \$25,000,000

T =Cash Market

E =\$15,001 - \$50,000

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Goeke, Joseph R.

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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				
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	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)
35. Pioneer Cullen - Value Fund	A	Dividend	J	T					
36. Montgomery County Bonds (2029)	A	Interest	K	T					
37. JNL Elite Annuity (fixed)	A	Interest	L	T					
38. Eagle Mid - Capital Fund	A	Dividend	J	T					
39. Vanguard Mega	A	Dividend	J	T	Buy (add'l)	06/13/19	J		
40. Pioneer Cullen - Value Fund C	A	Dividend	K	T					
41. Chain Bridge Bank - Stock	A	Dividend	K	T					
42. National Grid PLC	A	Dividend	J	T					
43. Citigroup - Shares	A	Dividend	K	T					
44. BB&T - Account	A	Interest	J	T					
45. Palm Beach County Fla Education Bonds 2010A	A	Interest			Sold	08/08/19	L		no gain or loss
46. USB Capital - Bonds	A	Interest	J	T					
47. CMA - Tax Exempt Fund	A	Interest	J	T					
48. Calamos - UNDERWRITER BOND FUND	A	Dividend	J	T					
49. Treasury - Level Plus Fund	B	Interest	M	T					
50. Merrill Lynch - Bank Deposit Prog.	A	Interest	J	T					
51. Montgomery County MD Bonds (2033)	A	Interest	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 =\$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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52. Berkshire Hathaway B shares		None	L	T					
53. Fidelity - Income Fund	A	Interest	K	T					
54. Merrill Lynch - CMA Fund	A	Interest	J	T					
55. Jefferson Pilot - Ins. Policies (successor LIBERTY MUTUAL)	B	Dividend	L	T	Redeemed (part)	06/19/19	J		loss
56. Berkshire - Life Ins. Policy	D	Dividend	L	T					
57. ABN AMRO - Cap Fund TR VII	A	Interest	J	T					
58. HSBC Bank C/D	A	Interest			Redeemed	11/27/19	L		no gain or loss
59. Lehman Bros - Bonds	B	Interest	L	T					
60. Evergreen - Wells Fargo Asset Allocation Fund	A	Dividend	J	T					
61. Oregon School Bonds	C	Interest	M	T					
62. Citigroup - Capital Bonds	A	Interest	J	T					
63. BAC - Capital Trust Bonds	A	Interest	J	T					
64. General Mills Stock	A	Dividend	K	T					
65. Columbia - Small Cap Value Fund	A	Dividend	J	T					
66. Sentinel - Small Co. Fund	A	Dividend	J	T					
67. Metlife - Whole Life Insurance	A	Dividend	K	T					
68. GNMA - Bonds	A	Interest	J	T					

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69. Discover - Bonds - CD	A	Interest	L	T					
70. Washington State Economic Development Bonds	A	Interest	L	T					
71. Black Rock Global	A	Dividend	J	T					
72. ML Bank USA	A	Interest	J	T					
73. Bank Of Nova Scotia	B	Dividend	L	T					
74. PIMCO - All Asset Fund	A	Dividend	J	T					
75. Deutsche Unconstrained	A	Dividend	K	T					
76. Aegon NV Bonds	A	Interest	K	T					
77. McDonalds Corp.	A	Dividend	L	T					
78. ING Group	A	Interest	K	T					
79. Eaton Vance Risk Managed Fund	A	Dividend	J	T					
80. JP Morgan Chase - CD	C	Interest	L	T					
81. Power Shares Bank Amer. - Bonds	A	Interest	K	T					
82. Coty	A	Dividend	J	T					
83. UIT First Trust High Dividend	A	Dividend	L	T					
84. Ivy Large Cap Growth	A	Dividend	K	T					
85. Conoco Phillips	A	Dividend	J	T					

1 Income Gain Codes:

(See Columns B1 and D4)

2 Value Codes

(See Columns C1 and D3)

3 Value Method Codes

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86. exelon corp	A	Dividend	K	T					
87. intel	A	Dividend	K	T					
88. Chevron	A	Dividend	J	T					
89. National Rural Utility Coop	A	Interest	K	T	Buy	04/29/19	K		
90. FIA	A	Dividend	J	T					
91. Ocean City MD GO Bonds	A	Interest	L	T					
92. Anne Arundel County General Purpose Bonds G/O 2010	B	Interest	K	T					
93. Palm Beach County Qualified School Bonds	C	Interest	L	T					
94. Goldman Sachs Bank CD	A	Interest	L	T					
95. UIT Advisors Fund	A	Int./Div.	J	T					
96. Metropolitan Transportation Bonds	B	Interest	K	T					
97. MTA Mass rapid transit bonds	B	Interest	L	T					
98. Lansing Michigan Capital Improvement Bonds Eaton County	A	Interest			Redeemed	05/01/19	K		no gain or loss
99. Xtrackers	A	Interest	J	T	Buy	01/16/19	J		
100. Fort Lauderdale Special Obligation Bonds	B	Interest	K	T					
101. Anne Arundel co. general purpose bonds	B	Interest	K	T					
102. New orleans general purpose bonds	B	Interest	K	T					

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103. Shrewsbury mass land acquisition bonds	A	Interest	K	T					
104. Goldman Sachs C/D	A	Interest	K	T					
105. Fort Lauderdale Pension bonds	B	Interest	K	T					
106. Synchrony Bank C/D	A	Interest	K	T					
107. UPS stock	A	Dividend	K	T					
108. Honolulu Bonds (2035)	A	Interest			Redeemed	07/01/19	J		no gain or loss
109. Vanguard Total STK MKT ETF	A	Dividend	K	T					
110. Bank of Nova Scotia Stock	A	Dividend	K	T					
111. New Jersey Economic Development Authority Bonds	A	Interest	M	T					
112. Vanguard Health Care ETF	A	Dividend	J	T	Buy (add'l)	01/16/19	J		
113. Vanguard Dividend Appreciation ETF	A	Dividend	K	T					
114. Vanguard midcap	A	Dividend	K	T	Buy (add'l)	01/16/19	J		
115. Bank of America Account	A	Interest	J	T					
116. Putnam Capital Spectrum Fund	A	Dividend	J	T					
117. Janus Flexible Bond Fund	A	Interest	J	T					
118. Deutsche Managed Municipal Bond Fund	A	Interest	K	T					
119. Lord Abbett Bond Fund	A	Interest	J	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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120. Lincoln National Life Whole Life Insurance	A	Dividend	K	T					
121. Duke Energy Bonds	A	Interest	K	T	Buy	11/18/19	K		
122. Milwaukee Redev Bonds (2035)	A	Interest	M	T					
123. Wells Fargo Dep Shares 5.7%	B	Dividend	K	T					
124. Fresno (2025) Bonds	A	Interest	L	T					
125. San Bernardino Ca School bonds	A	Interest	J	T					
126. GE Cap BK C/D	A	Interest	L	T					

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

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Goeke, Joseph R.

Date of Report

09/14/2020

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

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Goeke, Joseph R.

Date of Report

09/14/2020

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/ Joseph R. Goeke**

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