

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) Armen Jr., Robert N.	2. Court or Organization United States Tax Court	3. Date of Report 04/11/2016
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Special Trial Judge	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2015 to 12/31/2015
7. Chambers or Office Address UNITED STATES TAX COURT 400 Second St., N.W. Washington, D.C. 20217		
IMPORTANT NOTES: The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.		

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

☐ NONE (No reportable positions.)

POSITION

NAME OF ORGANIZATION/ENTITY

1. Co-trustee (testamentary trust of family member (see Parts VII. & VIII.))	testamentary trust created by a deceased family member
2.	
3.	
4.	
5.	

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

☒ NONE (No reportable agreements.)

DATE

PARTIES AND TERMS

1.	
2.	
3.	

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III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see pp. 17-24 of filing instructions.)***A. Filer's Non-Investment Income**NONE *(No reportable non-investment income.)*DATESOURCE AND TYPEINCOME

(yours, not spouse's)

1. _____

2. _____

3. _____

4. _____

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

1. _____

2. _____

3. _____

4. _____

IV. REIMBURSEMENTS *— transportation, lodging, food, entertainment.**(Includes those to spouse and dependent children; see pp. 25-27 of filing instructions.)*NONE *(No reportable reimbursements.)*SOURCEDATESLOCATIONPURPOSEITEMS PAID OR PROVIDED

1. _____

2. _____

3. _____

4. _____

5. _____

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V. GIFTS. *(Includes those to spouse and dependent children; see pp. 28-31 of filing instructions.)*

☒ NONE *(No reportable gifts.)*

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

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

☒ NONE *(No reportable liabilities.)*

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

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

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

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
	(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
1. Dominion Resources stock	C	Dividend	L	T	Buy (add'l)	04/02/15	K		
2. Dominion Resources stock	C	Dividend	L	T	Buy (add'l)	11/12/15	J		
3. AT&T stock	C	Dividend	L	T					
4. Marathon Oil Corporation stock	C	Dividend	M	T					
5. Marathon Petroleum Corporation stock	C	Dividend	M	T					
6. Glaxo-Smith-Klein stock	A	Dividend	J	T					
7. Prudential Financial Inc. stock	A	Dividend	J	T					
8. American Electric Power stock	B	Dividend	K	T					
9. Walt Disney Company stock	A	Dividend	K	T					
10. Chevron Corporation stock	C	Dividend	M	T					
11. NRG Energy Inc. stock	A	Dividend	J	T					
12. Frontier Communication Inc. stock	A	Dividend	J	T					
13. PPG Industries Inc. stock	B	Dividend	K	T					
14. PPL Corporation stock (fka PA Power & Light)	D	Dividend	M	T					
15. Talen Energy Corporation stock	A	Dividend	J	T	Spinoff (from line 14)	06/01/15	J		
16. Merck & Company stock	A	Dividend	K	T					
17. U.S. Steel Corporation stock	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4)	A = \$1,000 or less F = \$50,001 - \$100,000	B = \$1,001 - \$2,500 G = \$100,001 - \$1,000,000	C = \$2,501 - \$5,000 H1 = \$1,000,001 - \$5,000,000	D = \$5,001 - \$15,000 H2 = More than \$5,000,000	E = \$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	J = \$15,000 or less N = \$250,001 - \$500,000 P3 = \$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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	(1) Amount Code I (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. CenterPoint Energy Inc. stock	C	Dividend	L	T					
19. Verizon Communications Inc. stock	D	Dividend	M	T					
20. Comcast Corporation stock	A	Dividend	K	T					
21. Teco Energy Inc. stock	A	Dividend	K	T					
22. Exxon-Mobil Corporation stock	B	Dividend	K	T					
23. Royal Dutch Shell PLC stock	B	Dividend	K	T	Buy	01/26/15	K		
24. Apple Inc. stock	A	Dividend	K	T					
25. Dreyfus Municipal Bond Fund	C	Dividend	L	T					
26. Dreyfus Disciplined Stock Fund	C	Dividend	K	T					
27. Dreyfus GNMA Fund	A	Dividend			Sold	05/11/15	K	A	
28. Dreyfus Opportunistic Mid-Cap Value Fund	A	Dividend	K	T	Buy	05/11/15	K		
29. T. Rowe Price International Stock Fund	B	Dividend	K	T					
30. T. Rowe Price Capital Appreciation Fund	B	Dividend	K	T					
31. T. Rowe Price VA Tax-Free Bond Fund	C	Dividend	L	T	Buy (add'l)	03/20/15	J		
32. T. Rowe Price VA Tax-Free Bond Fund	C	Dividend	L	T	Buy (add'l)	04/10/15	K		
33. T. Rowe Price VA Tax-Free Bond Fund	C	Dividend	L	T	Buy (add'l)	04/24/15	J		
34. T. Rowe Price VA Tax-Free Bond Fund	C	Dividend	L	T	Buy (add'l)	10/30/15	J		

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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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☐ 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)

35. T. Rowe Price VA Tax-Free Bond Fund	C	Dividend	L	T	Buy (add'l)	11/19/15	J		
36. Vanguard Prime Money Market Fund	A	Interest	J	T					
37. Vanguard Long-Term Municipal Bond Fund	D	Dividend	M	T	Buy (add'l)	11/19/15	J		
38. Vanguard International Growth Fund	C	Dividend	L	T					
39. Vanguard Index Fund - Small Cap Portfolio Fund	C	Dividend	L	T					
40. Third Avenue Value Fund	A	Dividend			Sold	04/13/15	K	B	
41. Mairs & Power Growth Fund	A	Dividend	J	T					
42. Columbia Value & Restructuring Fund	B	Dividend	K	T	Buy (add'l)	04/20/15	J		
43. Columbia Value & Restructuring Fund	B	Dividend	K	T	Buy (add'l)	04/27/15	J		
44. Columbia Tax-Exempt Fund	B	Dividend	K	T					
45. DWS Municipal Bond Fund	A	Dividend	K	T					
46. Delaware Health Care Fund	D	Dividend	L	T					
47. Fidelity Over-the-Counter Fund	B	Dividend	K	T					
48. Invesco Corporate Bond Fund	A	Dividend			Sold	04/13/15	J	A	
49. Capital One Bank	A	Interest	L	T					
50. Senate Federal Credit Union	A	Interest	K	T					
51. Bank of Scotland/ Halifax PLC	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	
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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)

52. U.S. Government obligations	B	Interest	K	T					
53. Bank of Lancaster	A	Interest	K	T					
54. Raymond James Bank	A	Interest	J	T	Sold (part)	04/01/15	L	A	
55. Raymond James Bank	A	Interest	J	T	Sold (part)	09/17/15	K	A	
56. PNC Bank	A	Interest	K	T					
57. Aberdeen Emerging Markets Fund	A	Dividend	J	T					
58. Morgan-Stanley Emerging Markets Fund (MSF)	A	Dividend	J	T					
59. Vanguard REIT Index Portfolio Fund	C	Dividend	L	T					
60. Vanguard Dividend Growth Fund	B	Dividend	K	T					
61. Vanguard Equity Income Fund	A	Dividend	K	T					
62. Vanguard 500 Index Fund	A	Dividend	K	T					
63. Vanguard Index Trust - European Stock Portfolio Fund	A	Dividend	K	T					
64. Vanguard Growth & Income Fund	A	Dividend	J	T					
65. Vanguard Balanced Index Fund	A	Dividend	K	T					
66. Vanguard GNMA Fund	A	Dividend	K	T					
67. Vanguard Long-Term Corporate Bond Fund	B	Dividend	K	T					
68. Vanguard Health Care Fund	D	Dividend	M	T	Buy (add'l)	01/10/15	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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69. Vanguard Health Care Fund	D	Dividend	M	T	Buy (add'l)	04/24/15	J		
70. Vanguard Energy Fund	A	Dividend	J	T	Buy (add'l)	01/10/15	J		
71. Vanguard Diversified Equity Fund	B	Dividend	K	T					
72. Vanguard Balanced Index Fund	A	Dividend	J	T					
73. Vanguard High Dividend Yield Index Fund	A	Dividend	J	T					
74. Vanguard Mid-Cap Index Fund	A	Dividend	J	T					
75. Invesco Developing Markets Fund (GTDDX)	A	Dividend	J	T					
76. Diversified Real Asset Inc. stock	A	Dividend	J	T					
77. Tecumseh Products Company (Class B) stock	A	Dividend			Sold	05/29/15	J	A	
78. DSP Group Inc. stock	A	Dividend			Sold (part)	01/16/15	J	A	
79. DSP Group Inc. stock	A	Dividend			Sold	02/10/15	J	A	
80. Goodrich Petroleum Corporation notes	A	Interest			Sold	05/29/15	J	A	
81. Clayton Williams Energy Inc. notes	A	Interest			Sold	05/11/15	J	A	
82. MVC Capital Inc. notes	A	Interest	J	T					
83. Resolute Energy Corporation notes	A	Interest			Sold	06/01/15	J	A	
84. Oxford Lane Capital Corporation stock	A	Dividend	J	T					
85. Comstock Resources Inc. notes	A	Interest	K	T	Buy	01/08/15	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 \$5,000,000	M ~\$100,001 - \$250,000 P2 ~\$5,000,001 - \$25,000,000	
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86. Comstock Resources Inc. notes	A	Interest	K	T	Buy (add'l)	01/21/15	J		
87. BPZ Resources Inc. notes	A	Interest	J	T	Sold (part)	05/29/15	K	A	
88. Market Vectors Gold Miner ETF TR (GDX)	A	Dividend	J	T					
89. Aeropostale stock	A	Dividend			Sold	02/10/15	J	A	
90. Lai Sun Development Company Ltd stock	A	Dividend			Sold	05/29/15	J	A	
91. Rosetta Stone Inc. stock	A	Dividend			Sold	05/29/15	K	A	
92. BPZ Resources Inc. stock	A	Dividend			Sold	05/29/15	J	A	
93. Seachange International Inc. stock	A	Dividend			Sold	05/29/15	K	B	
94. Sizmek Inc. stock	A	Dividend			Sold	05/29/15	K	B	
95. Covisint Corp. stock - buy	A	Dividend			Buy (add'l)	02/27/15	J		
96. Covisint Corp. stock - sell	A	Dividend			Sold	05/29/15	J	A	
97. Athabasca Oil Corp. stock	A	Dividend			Sold	05/29/15	J	A	
98. WCI CMNTYS Com stock	A	Dividend			Sold	05/29/15	J	A	
99. Enernac Inc. stock	A	Dividend			Sold	08/06/15	J	A	
100. Sandstorm Gold Limited Com NEW stock	A	Dividend			Sold	05/29/15	J	A	
101. QEP Res Inc. stock	A	Dividend			Sold	05/29/15	J	A	
102. Paratek Pharmaceuticals Inc. - buy	A	Dividend			Buy	04/30/15	J		

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103. Paratek Pharmaceuticals Inc. - sell	A	Dividend			Sold	05/29/15	J	A	
104. IBM stock - buy	A	Dividend			Buy	02/11/15	J		
105. IBM stock - sell	A	Dividend			Sold	05/29/15	J	A	
106. Roumell Opportunistic Value Fund - Institutional Class N/L (RAMSX)	B	Int./Div.	M	T	Buy	06/01/15	M		
107. Vanguard Health Care Fund (see Part VIII)	B	Dividend	K	T					
108. Vanguard Long-Term Bond Index Fund (see Part VIII)	B	Dividend	K	T					
109. Vanguard Long-Term Tax-Exempt Fund (see Part VIII)	B	Dividend	K	T					
110. Vanguard Prime Money-Market Fund (see Part VIII)	A	Interest	J	T					
111. AT&T stock (see Part VIII)	B	Dividend	K	T					
112. Chevron Corporation. stock (see Part VIII)	B	Dividend	K	T					
113. Dominion Resources stock (see Part VIII)	B	Dividend	K	T					
114. PPL Corporation stock (fka PA Power & Light) (see Part VIII)	B	Dividend	K	T					
115. Talen Energy Corportion stock (see Part VIII)	A	Dividend	J	T	Spinoff (from line 114)	06/01/15	J		
116. Royal Dutch Shell PLC stock (see Part VIII)	B	Dividend	K	T					
117. Verizon Communications Inc. stock (see Part VIII)	B	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 ~\$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

ArmenJr., Robert N.

Date of Report

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

Part I. "Positions":

Filer is co-trustee of a testamentary trust created by filer's step-mother for the principal benefit of step-mother's surviving brother. Other co-trustee is filer's spouse. Neither co-trustee is compensated, and neither trustee has any equitable interest whatsoever (remote, contingent, reversionary, or otherwise) in either the trust corpus or the trust income. Trust assets are all either shares in mutual funds or stock in Fortune 500 companies, as per lines 107-117 of Part VII of this Report and further explanation below.

Part VII. "Investments and Trusts":

Savings accounts and some investments automatically reinvest earnings, adding same to principal. Brokerage-related income is retained and reinvested. Assets in lines 107-117 are assets held by the trust that is referenced above and in Part I of this report.

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Name of Person Reporting

ArmenJr., Robert N.

Date of Report

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IX. CERTIFICATION.

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

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

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

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

Committee on Financial Disclosure
Administrative Office of the United States Courts
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