

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) Buchanan, Theresa C.	2. Court or Organization U.S. District Court, EDVA	3. Date of Report 07/16/2015
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. Magistrate Judge	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 401 Courthouse Square Alexandria, Virginia 22314		
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. Trustee (see VIII)	Trust # 1
2. Directory/Secretary/Vice President (see VIII)	Sub-S Corporation #1 [REDACTED]
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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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. 2014

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.

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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. Rental Investment Property "P" [REDACTED]	E	Rent	N	S					
2. Rental Investment Property "G" - [REDACTED]	E	Rent	N	S					
3. Rental Investment Property - "S" [REDACTED]	E	Rent	O	S					
4. Real Estate Investment Property - "B" [REDACTED]	E	Rent	P1	R	Buy	05/01/14	P1		[REDACTED]
5. Partnership Share		None	N	V					
6. Amgen, Inc.	A	Dividend			Sold	10/02/14	K	A	
7. AM. Wash. Mutual Inv. Fund	C	Dividend	M	T					
8. Merrill Lynch CBA Money Fund	A	Interest	J	T					Balance varies
9. Microsoft Corp.	A	Dividend			Sold	10/02/14	K	C	
10. Intel Corp.	A	Dividend			Sold	10/02/14	K	A	
11. General Electric Corp.	A	Dividend			Sold	10/02/14	K	A	
12. EMC Corp. Mass	A	Dividend			Sold	10/02/14	K	C	
13. Johnson & Johnson	A	Dividend			Sold	10/02/14	K	E	
14. Nortel Networks Corp.		None			Sold	10/02/14	J	A	
15. Delaware Group Div/Inc Fund	A	Dividend	J	T					
16. Growth Fund of America	A	Dividend	M	T					
17. Texas Instruments	A	Dividend			Sold	10/02/14	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
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 \$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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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 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. QualComm, Inc.	A	Dividend			Sold	10/02/14	J	A	
19. Nuveen VA Muni. Bonds	A	Dividend			Sold	10/02/14	J	A	
20. Pinco Real Return Bonds	A	Dividend			Sold	10/02/14	J	A	
21. Disney	A	Dividend	J	T					
22. [REDACTED]	A	Dividend	K	U					[REDACTED]
23. Burke & Herbert Bank	A	Interest	J	T					Balance varies
24. Black Rock Munivest Fund	A	Dividend			Sold	10/02/14	J	A	
25. Alliance Bernstein		None			Sold	10/02/14	J	A	
26. Blackrock Int'l	A	Dividend			Sold	10/02/14	J	A	
27. Calamos Growth		None			Sold	10/02/14	K	A	
28. Columbia Marisco Growth		None			Sold	10/02/14	K	A	
29. Davis NY Venture		None			Sold	10/02/14	K	A	
30. JP Morgan Value	A	Dividend			Sold	10/02/14	K	A	
31. Columbia Seligman		None	K	T					
32. John Hancock Regional Bank Fund	A	Dividend	K	T					
33. Henderson Global Equity Income Fund	B	Dividend	K	T					
34. Hennessy Focus Fund		None	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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35. Matthews Pacific Tiger Fund	A	Dividend	K	T					
36. Oppenheimer Developing Markets Fund	A	Dividend	K	T					
37. RS Global Natural Resources Fund		None	K	T					
38. Satuit Capital US Emerging Companies Fund		None	L	T					
39. Touchstone Sands		None	K	T					
40. Virtus RealEstate Securites Fund	A	Dividend	K	T					
41. Schwab Govt. Money Fund	A	Dividend	K	T					
42. Newport News Bond	A	Dividend			Sold	07/15/14	K	A	
43. VA Polytechnic Bond	A	Dividend			Sold	06/01/14	J	A	
44. Virginia College Bond	A	Dividend			Sold	09/01/14	J	A	
45. Lord Abbett Intern Tax	A	Dividend	K	T					
46. Heartland Value Ford Inv.	B	Dividend	J	T	Buy	12/30/14	J		
47. Jensen Quality Growth Fund	A	Dividend	K	T	Buy	12/18/14	K		
48. Oakmark Select Fund	B	Dividend	K	T	Buy	12/08/14	K		
49. Schwab Health Care Fund	A	Dividend	J	T	Buy	12/09/14	J		
50. Ishares MSCI Emerg. Mkt Fund	A	Dividend			Sold	02/26/14	J	A	
51. Ishares TR MSCI EAFE	A	Dividend	K	T					

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52. SPDR S&P500 ETF TR	A	Dividend	J	T					
53. SPDR Nureen Barclay EFT	A	Dividend	K	T					
54. Vanguard Charlotte ETF	A	Dividend	J	T					
55. Vanguard Info. Technology	A	Dividend	J	T					
56. Vanguard Int'l Equity Fund	A	Dividend	K	T	Buy	09/03/14	K		
57. Vanguard Small Cap	A	Dividend	J	T					
58. Ishares Russell 2000	A	Dividend	J	T	Buy	06/13/13	J		
59. Vanguard Inter-Term Tax	A	Dividend	K	T	Buy	09/03/14	K		
60.									

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

I. ** [REDACTED] no longer reveals [REDACTED] separate investments nor the assets [REDACTED] trust to me. I have no idea what [REDACTED] owned, bought, or sold during 2013. I am not beneficiary of the [REDACTED] trust.

1. The Trust #1 is a life insurance trust created estate planning purposes.

2. The Sub-S corporation is a wholly [REDACTED]-owned corporation.

VII. 1. Assessed value of [REDACTED] property "P" was \$317,706 in 2014.

2. Assessed value of [REDACTED] property "G" was \$465,649 in 2014.

3. Assessed value of [REDACTED] real estate "S"(formerly undesignated) was \$490,300 in 2014.

4. Assessed value of [REDACTED] real estate "B" was \$1,087,600 in 2014.

5. This partnership share refers to Part III B, line 1. The value is equal to the dollar amount invested.

6. Line 58 inadvertently omitted from 2013 disclosure.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED].

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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/ Theresa C. Buchanan**

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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Washington, D.C. 20544