

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2013

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 03/27/2014
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 01/01/2013 to 12/31/2013
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 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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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	K	T					
2. Ing Annuity (X)	E	Distribution	O	T					
3. Citibank Checking	A	Interest	K	T					
4. Citibank Money Market Checking	A	Interest	M	T					
5. T. D. Ameritrade Mney Mkt	A	Int./Div.	J	T					
6. Alps Services Brown Cam Small Co Fd 1		None	J	T	Sold (part)	01/08/13	J	A	
7.					Sold (part)	03/15/13	J	A	
8.					Sold (part)	06/27/13	J	A	
9. AQR Managed Funds		None	J	T	Buy	09/25/13	J		
10. Artisan Fds Inc Mid Cap Value Fd		None	J	T	Sold (part)	01/08/13	J	A	
11.					Sold (part)	03/15/13	J	A	
12.					Buy (add'l)	06/27/13	J		
13. Berwyn Fd Inc Comm	A	Dividend	J	T	Sold (part)	01/08/13	J	A	
14.					Sold (part)	03/15/13	J	A	
15.					Buy (add'l)	04/03/13	J		
16.					Sold (part)	06/27/13	J	A	
17. Bridgeway Fund, Inc.		None	J	T	Buy	04/03/13	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 = \$250,000.001 - \$500,000.000	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 \$5,000,000.000	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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☐ 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 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.					Sold (part)	06/27/13	J	A	
19. Buffalo Fds Mid Cap		None	J	T	Sold (part)	01/08/13	J	A	
20.					Sold (part)	03/15/13	J	A	
21.					Buy (add'l)	04/03/13	J		
22.					Sold (part)	06/27/13	J	A	
23. Credit Suisse Fds Commodity Return Strategy Com		None			Buy (add'l)	01/08/13	J		
24.					Sold	04/03/13	J	A	
25. Dodge & Cox Fds Intl Stk Fd	A	Dividend	J	T	Sold (part)	01/08/13	J	A	
26.					Sold (part)	03/15/13	J	A	
27.					Buy (add'l)	04/03/13	J		
28.					Sold (part)	06/27/13	J	A	
29. Dodge & Cox Funds Stk Fd	A	Dividend	J	T	Buy (add'l)	01/08/13	J		
30.					Sold (part)	03/15/13	J	A	
31.					Sold (part)	04/03/13	J	A	
32.					Sold (part)	06/27/13	J	A	
33. Ing Global Fd. Real Estate		None	J	T	Buy	01/08/13	J		
34.					Sold (part)	03/15/13	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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☐ 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.					Sold (part)	06/27/13	J	A	
36. Janus Perkins Midcp VI Inv T	A	Dividend			Buy (add'l)	01/08/13	J		
37.					Sold (part)	03/15/13	J	A	
38.					Sold (part)	04/03/13	J	A	
39.					Sold (part)	06/27/13	J	A	
40.					Sold	09/25/13	J	A	
41. Jensen Portfolio Inc Com	A	Dividend	J	T	Sold (part)	01/08/13	J	A	
42.					Sold (part)	03/15/13	J	A	
43.					Sold (part)	04/04/13	J	A	
44.					Sold (part)	06/27/13	J	A	
45. Metro West Fds Total Return Bd Fd	A	Dividend	J	T	Buy (add'l)	01/08/13	J		
46.					Sold (part)	04/03/13	J	A	
47.					Buy (add'l)	06/27/13	J		
48.					Buy (add'l)	09/25/13	J		
49. Northern Fds Small Cap Fd	A	Dividend			Sold (part)	01/08/13	J	A	
50.					Sold (part)	03/15/13	J	A	
51.					Buy (add'l)	04/03/13	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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☐ 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.					Sold	06/27/13	J	A	
53. Northern Lights Altegris		None			Sold (part)	01/08/13	J	A	
54.					Sold (part)	03/15/13	J	A	
55.					Sold (part)	04/03/13	J	A	
56.					Buy (add'l)	06/27/13	J		
57.					Sold	09/26/13	J	A	
58. Pimco Real Return Fd CL D		None			Sold	01/08/13	J	A	
59. Pimco Total Return	A	Dividend	J	T	Sold (part)	01/08/13	J	A	
60.					Sold (part)	04/03/13	J	A	
61.					Buy (add'l)	06/27/13	J		
62. Price T. Rowe High Yield Fd I Com	A	Dividend			Sold (part)	01/08/13	J	A	
63.					Sold (part)	03/15/13	J	A	
64.					Sold (part)	04/03/13	J	A	
65.					Sold	06/26/13	J	A	
66. Rowe T. Price Equity Income F Sh Ben Int	A	Dividend	J	T	Buy (add'l)	01/08/13	J		
67.					Sold (part)	03/15/13	J	A	
68.					Sold (part)	04/03/13	J	A	

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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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69.					Sold (part)	06/27/13	J	A	
70. Rowe T. Price New Am Growth F Sh Ben Int	A	Dividend			Buy (add'l)	01/08/13	J		
71.					Sold (part)	03/15/13	J	A	
72.					Sold (part)	04/03/13	J	A	
73.					Sold (part)	06/27/13	J	A	
74.					Sold	09/26/13	J	A	
75. Royce Microcap Investment Cl		None			Buy (add'l)	01/08/13	J		
76.					Sold (part)	03/15/13	J	A	
77.					Buy (add'l)	04/03/13	J		
78.					Sold (part)	06/27/13	J	A	
79.					Sold	09/24/13	J	A	
80. SSGA Fds Emerging Mkt		None	J	T	Sold (part)	01/08/13	J	A	
81.					Buy (add'l)	04/03/13	J		
82. T Rowe Real Estate Fd		None			Sold	01/08/13	J	A	
83. T Rowe Price Intl Bd Fd	A	Dividend			Buy (add'l)	01/08/13	J		
84.					Buy (add'l)	04/02/13	J		
85.					Buy (add'l)	06/27/13	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.					Sold	09/26/13	J	A	
87. T Rowe Price Blue Chip		None	J	T	Buy	09/25/13	J		
88. T Rowe Price Intl Emerg Mkts Stk	A	Dividend	J	T	Buy (add'l)	01/08/13	J		
89.					Buy (add'l)	04/03/13	J		
90.					Buy (add'l)	06/27/13	J		
91. Templeton Income Tr Global Bond Advisor	A	Dividend	J	T	Sold (part)	01/08/13	J	A	
92.					Sold (part)	03/15/13	J	A	
93.					Buy (add'l)	06/27/13	J		
94. Thornburg Interntl Value Inst	A	Dividend	J	T	Sold (part)	01/08/13	J	A	
95.					Sold (part)	03/15/13	J	A	
96.					Sold (part)	04/03/13	J	A	
97.					Buy (add'l)	06/27/13	J		
98.					Buy (add'l)	09/25/13	J		
99. AQR Managed Futures	A	Dividend	J	T	Buy	09/24/13	J		
100. American Century Government Bond	A	Dividend	J	T	Sold (part)	01/07/13	J	A	
101.					Sold (part)	04/04/13	J	A	
102.					Buy (add'l)	06/26/13	J		

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103.					Buy (add'l)	09/24/13	J		
104. Artisan Fds Inc Mid Cap Value Fd	A	Dividend	J	T	Buy	09/24/13	J		
105. Bridgeway Blue Chip	A	Dividend	J	T	Buy	04/04/13	J		
106.					Sold (part)	06/26/13	J	A	
107.					Sold (part)	09/24/13	J	A	
108. Buffalo Fds Mid Cap Fd		None			Sold	01/07/13	J	A	
109. Credit Suisse Funds Commodity		None			Buy (add'l)	01/07/13	J		
110.					Sold	04/04/13	J	A	
111. Dodge & Cox Funds International Stock Fund	A	Dividend	J	T	Sold (part)	01/07/13	J	A	
112.					Buy (add'l)	04/04/13	J		
113.					Sold (part)	06/26/13	J	A	
114.					Sold (part)	09/24/13	J	A	
115. Dodge & Cox Funds Stock Fund	A	Dividend	J	T	Sold (part)	01/07/13	J	A	
116.					Sold (part)	04/04/13	J	A	
117.					Sold (part)	06/26/13	J	A	
118.					Sold (part)	09/24/13	J	A	
119. Janus Perkins Mid Cp VI Inv T	A	Dividend			Sold (part)	04/04/13	J	A	

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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 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)
120.					Sold (part)	06/26/13	J	A	
121.					Sold	09/24/13	J	A	
122. Janus Short Term Bd T	A	Dividend	J	T	Buy (add'l)	01/07/13	J		
123.					Buy (add'l)	04/04/13	J		
124.					Sold (part)	06/26/13	J	A	
125.					Buy (add'l)	09/24/13	J		
126. Jensen Quality Growth J	A	Dividend	J	T	Sold (part)	01/07/13	J	A	
127.					Sold (part)	04/04/13	J	A	
128.					Sold (part)	06/26/13	J	A	
129.					Sold (part)	09/24/13	J	A	
130. Metropolitan West Total Return	A	Dividend	K	T	Buy (add'l)	01/07/13	J		
131.					Sold (part)	04/04/13	J	A	
132.					Buy (add'l)	06/26/13	J		
133.					Buy (add'l)	09/24/13	J		
134. Northern FDS Small Cap Fd	A	Dividend	J	T	Sold (part)	01/07/13	J	A	
135.					Sold (part)	04/04/13	J	A	
136.					Sold (part)	06/26/13	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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Name of Person Reporting

Gerber, Joel

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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.					Sold (part)	09/24/13	J	A	
138. Northern Lights		None			Buy (add'l)	01/07/13	J		
139.					Buy (add'l)	04/04/13	J		
140.					Buy (add'l)	06/26/13	J		
141.					Sold	09/24/13	J	A	
142. Pimco Real Return Fd C1 D		None	J	T	Buy (add'l)	01/07/13	J		
143.					Buy (add'l)	04/04/13	J		
144.					Buy (add'l)	06/26/13	J		
145.					Sold (part)	09/24/13	J	A	
146. Pimco Total Return Fund Institutional	A	Dividend	K	T	Buy	01/07/13	J		
147.					Buy (add'l)	04/04/13	J		
148.					Buy (add'l)	06/26/13	J		
149.					Buy (add'l)	09/24/13	J		
150. Price T Rowe High Yield Fd 1 Com	A	Dividend	J	T	Sold (part)	01/07/13	J	A	
151.					Sold (part)	04/04/13	J	A	
152.					Sold (part)	06/26/13	J	A	
153.					Sold (part)	09/24/13	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 = \$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. T Rowe Price Com (Short Term)	A	Dividend	J	T	Sold (part)	01/07/13	J	A	
155.					Buy (add'l)	04/04/13	J		
156.					Sold (part)	06/26/13	J	A	
157. Rowe T Price Equity Income F Sh Ben	A	Dividend	J	T					
158. Rowe T Price Emerging Mkt Sh	A	Dividend	J	T	Sold (part)	01/07/13	J	A	
159.					Sold (part)	04/04/13	J	A	
160.					Sold (part)	06/26/13	J	A	
161.					Sold (part)	09/24/13	J	A	
162. T Rowe Price Intl Intl Bd Fd	A	Dividend	J	T	Buy (add'l)	01/07/13	J		
163.					Buy (add'l)	04/04/13	J		
164.					Buy (add'l)	06/26/13	J		
165.					Sold (part)	09/24/13	J	A	
166. T Rowe Price Blue Chip		None	J	T	Buy	09/24/13	J		
167. Templeton Income Tr Global Bond	A	Dividend	J	T	Sold (part)	01/07/13	J	A	
168.					Buy (add'l)	04/04/13	J		
169.					Buy (add'l)	06/26/13	J		
170.					Sold (part)	09/24/13	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 = \$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

Gerber, Joel

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03/27/2014

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. Thornburg Interntl Value Inst	A	Dividend	J	T	Sold (part)	01/07/13	J	A	
172.					Buy (add'l)	04/04/13	J		
173.					Buy (add'l)	06/26/13	J		
174.					Sold (part)	09/24/13	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	
	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	
	Q1 = \$25,000,001 - \$50,000,000	Q2 = \$50,000,001 - \$100,000,000	Q3 = \$100,000,001 - \$500,000,000	Q4 = More than \$500,000,000	
3. Asset Location Codes	1 = Domestic	2 = Foreign	3 = U.S. Trust	4 = Foreign Trust	
4. Asset Type Codes	1 = Equity	2 = Fixed Income	3 = Real Estate	4 = Other	

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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS (Indicate part 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 neither I nor any person under my control and knowledge and the information of which I 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: St. Joel Corbett

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. § 501).

Committee on Financial Disclosure
Administrative Office of the United States Courts
Suite 2-600
One Constitution Avenue, NW
Washington, D.C. 20544