

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2012

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) Kerrigan, Kathleen M.	2. Court or Organization United States Tax Court	3. Date of Report 05/05/2013
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Tax Court Judge	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 1/1/2012 to 12/31/2012
7. Chambers or Office Address United States Tax Court 400 Second Street N.W. Washington, DC 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. 1998	Baker & Hostetler LLP 401(k) and 401(a) plan with former law firm (Reported in Part VII) All in one account managed by Fidelity and allowed to select from
2.	certain investments. Also, have option of rolling over into an IRA.
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. 2012

Core Media Incorporated- Salary

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. Schwab Roth Contributory IRA	A	Dividend	J	T					
2. - Janus Fund									
3. Schwab IRA Rollover	A	Dividend	M	T					
4. - Schwab Cash Reserves									
5. - Janus Fund									
6. Schwab One Account #1 (H)									
7. Janus Fund	A	Dividend	K	T					
8. Baker & Hostetler retirement account	C	Dividend	M	T					
9. - Fid Growth Co K									
10. - PIM Total Rt Inst									
11. - Spartan 500 Index									
12. - Baker & Hostetler Composite Fund									
13. - WFA Govt Securities									
14. Schwab Muni account (H)									
15. Arizona St Transr [REDACTED]	B	Interest	K	T					
16. Austin Tex Wtr & WA [REDACTED]	A	Interest	K	T	Buy	07/12/12	K		
17. Bay Area Toll Auth [REDACTED]	B	Interest			Sold	11/02/12	K	D	

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	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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18. California ST	B	Interest	K	T					
19. California ST Dep	B	Interest	K	T					
20. Colorado Health FAC	B	Interest			Sold	04/23/12	K	C	
21. Colorado Health	A	Interest	K	T					
22. Houston Tex Uti	B	Interest	K	T					
23. Long Island PWR AUT	B	Interest	K	T					
24. Louisiana PUB FACS	B	Interest	K	T					
25. Miami-Dade CNTY FLA	B	Interest	K	T					
26. Michigan St Hosp. Fl	B	Interest	K	T	Buy	05/01/12	K		
27. Michigan ST Trun	B	Interest	K	T					
28. New Jersey ST CTFS	A	Interest			Sold	06/20/12	K	C	
29. New York Ny	B	Interest	K	T					
30. New York ST URBA	B	Interest			Sold	07/11/12	K	D	
31. Norfolk VA Wtr Rev	A	Interest	K	T	Buy	06/07/12	K		
32. Norfolk VA Wtr REv	B	Interest	K	T	Buy	03/22/12	K		
33. Noeth Carolina Mun	A	Interest	K	T					
34. San AntonioTex Ele	A	Interest	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. San Fransico Calf [REDACTED]	B	Interest	K	T					
36. Texas State [REDACTED]	B	Interest			Sold	03/22/12	K	C	
37. Virginia College BL [REDACTED]	B	Interest	K	T					
38. Virginia College Bl [REDACTED]	A	Interest	K	T					
39. Virginia Commonwealth TR [REDACTED]	A	Interest	K	T	Buy	02/16/12	K		
40. Virginia ST PUB BLD [REDACTED]	A	Interest	K	T					
41. Virginia ST PUB BLD [REDACTED]	A	Interest	J	T					
42. Virginia ST RES [REDACTED]	A	Interest			Sold	01/30/12	K	A	
43. Virginia ST PUB SCH	A	Interest	K	T					
44. Virginia ST RES [REDACTED]	A	Interest	K	T					
45. Virginia ST RES [REDACTED]	A	Interest	J	T					
46. Virginia ST RES [REDACTED]	A	Interest			Sold	05/18/12	K	C	
47. Virginia ST RES AUT [REDACTED]	B	Interest	K	T					
48. Virginia ST RES AUT [REDACTED]	A	Interest	K	T					
49. Virginia ST. RES AUT [REDACTED]	A	Interest	K	T					
50. Virginia ST RES Aut [REDACTED]	B	Interest	K	T					
51. Virginia ST RES Aut [REDACTED]	B	Interest	K	T					

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52. Virginia ST RES Aut	B	Interest	K	T					
53. Schwab 1 Account # 2 (H)									
54. JP Morgan Chase common stock	A	Dividend	K	T					
55. Walgreen Company common stock	A	Dividend	J	T					
56. Schwab Cash Reserves	A	Dividend	J	T					
57. Templeton Dragon Fund	A	Dividend	K	T					
58. PIMCO Total Return Fund	D	Dividend	M	T					
59. Matthews India Fund	A	Dividend	K	T					
60. Schwab Total Stock Mkt	C	Dividend	M	T					
61. Vanguard Value Index	D	Dividend	M	T					
62. Yacktman Fund	D	Dividend	N	T					
63. ISHARES MSCI CDA IDX FD	A	Dividend	K	T					
64. SCHW INTL EQ ETF	A	Dividend	L	T					
65. Schwab Rollover IRA #2	E	Dividend	O	T					
66. - Templeton Dragon Fund									
67. - PIMCO Total Return Fund									
68. - Blackrock Latin America									

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69. - Matthews India Fund									
70. - Oppenheimer Equity Income Fund									
71. - Schwab Total Stock MKT									
72. - SCW INTL EQ ETF									
73. Schwab One Account #3 (H)									
74. EShares ETF Emerging Markets		None	J	T	Buy	12/06/12	J		
75. IShares AAA Rated corporate bond		None	J	T	Buy	10/03/12	J		
76. IShares Gold Trust		None	J	T	Sold (part)	07/17/12	J		
77.					Buy (add'l)	02/02/12	J		
78. Currency Share Japanese		None			Sold	02/02/12	J	A	
79. Ishares IBoxx Investop	A	Dividend			Sold	10/03/12	J	A	
80. Ishares MSCI Germany		None	J	T	Buy	10/04/12	J		
81. IShares MSCI HK IDX FD	A	Dividend	J	T	Sold (part)	02/02/12	J	A	
82.					Buy (add'l)	10/03/12	J		
83. ISHARES FTSE EPRA NAREIT	A	Dividend	J	T	Buy	08/02/12	J		
84.					Buy (add'l)	06/06/12	J		
85. ISHARES RUSEELL 2000	A	Dividend	J	T	Buy	02/02/12	J		

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86. PIMCO EXCH Traded Fund 15+ YR US TIPS INDEX FD	A	Dividend	J	T	Sold (part)	02/02/12	J	A	
87.					Sold (part)	10/03/12	J	A	
88. POWERSHS DB Commodity Index		None	J	T	Buy	02/02/12	J		
89. PowerSHS EXCH TRAD FD TREMERGING MKTS		None	J	T	Buy	10/04/12	J		
90. Power SHS S&P ETF 500	A	Dividend	J	T	Buy	02/03/12	J		
91. PowerSHS QQQ Trust SER 1	A	Dividend	J	T	Sold (part)	10/03/12	J	A	
92.					Buy (add'l)	02/02/12	J		
93. SPDR S&P 500 ETF TR	A	Dividend			Sold	06/06/12	J		
94.					Buy	02/02/12	J		
95. SPDR Gold Trust		None	J	T	Sold (part)	06/06/12	J	A	
96.					Sold (part)	07/17/12	J	A	
97. SPDR Barclays Capital High Yield	A	Dividend			Buy	02/09/12	J		
98.					Sold	10/03/12	J	A	
99. Vanguard DIV Apprciation	A	Dividend	J	T	Sold (part)	06/06/12	J		
100.					Buy (add'l)	10/03/12	J		
101.					Buy (add'l)	02/02/12	J		
102. Vanguard MSCI Emerging	A	Dividend	J	T					

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103.					Buy (add'l)	02/02/12	J		
104.					Sold (part)	12/06/12	J		
105. Vanguard MSCI EAFE ETF	A	Dividend	J	T	Buy (add'l)	02/02/12	J		
106. Vanguard REIT	A	Dividend	J	T	Sold (part)	02/02/12	J	A	
107.					Buy (add'l)	06/06/12	J		
108. Vanguard Total Stock MKT	A	Dividend	J	T	Sold (part)	02/02/12	J	A	
109. Wisdomtree Asia ETF Local Debt Fund	A	Dividend	J	T					
110. Schwab Cash Reserves	A	Dividend	J	T					
111. ISHARES TR BARCLAYS BONDBARCLAYS 710 YEAR TREASURY Bond Fund	A	Dividend	J	T					
112. ISHARES BARCLAYS TIPS Bond Fund	A	Dividend	J	T	Sold (part)	10/03/12	J	A	
113.					Sold (part)	06/06/12	J	A	
114. Market Vectors ETF	A	Dividend	J	T	Buy	06/06/12	J		
115. Schwab High Yield Investor Savings (X)	A	Interest	N	T					
116. Schwab One Account #4 (H)									
117. Oppenheimer Equity Income Fund	A	Dividend	K	T					
118. Yacktman Fund		None	K	T					

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119. Schwab Roth IRA #2	A	Dividend	J	T					
120. -Templeton Dragon Fund									
121. - Matthews India Fund									
122. - Schwab Total Stock Market									
123. - iShares MSCI Canada Index									
124. - Schwab International Equity ETF									
125. Schwab One Account #5 (H)									
126. Oppenheimer Equity Income Fund	A	Dividend	K	T					
127. Yackman Fund	A	Dividend	K	T					
128. Schwab Roth IRA #4	A	Dividend	J	T					
129. - Matthews India Fund									
130. - Schwab Total Stock Market									
131. - Templeton Dragon Fund									
132. DWS Large Cap Value Fund-S	C	Dividend	M	T					
133. Bank of America Series of accounts	A	Interest	N	T					
134. American Express Savings Account	C	Interest	O	T					
135. ING Savings Account	C	Interest	O	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 \$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)
136. Capitol One Savings Account	C	Interest	O	T					
137. Congressional Bank Savings Accounts	B	Interest	M	T					
138. Discover Bank Savings Account	B	Interest	M	T					
139. EDSC Limited Partnership	D	Rent	M	W					
140. NSP Limited Partnership	E	Rent	N	W					
141. VSSC Limited Partnership	E	Rent	M	W					
142. THSC Limited Partnership	E	Rent	N	W					
143. Falstaff Center LLP	D	Interest	M	W					
144. EDSC Limited Partnership	D	Interest	N	W					
145. PHSA Medical Center LLC	E	Rent	N	W					
146. Acacia Federal Savings Bank (Y)									

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

In Part VII. Investments and Trusts, lines 139 through 144, are all limited partnership investments in real estate.

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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/ **Kathleen M. Kerrigan**

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