

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) Kerrigan, Kathleen M.	2. Court or Organization United States Tax Court	3. Date of Report 05/10/2015
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 1/1/2014 to 12/31/2014
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. Adjunct Faculty	Georgetown University Law Center
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.)*

<u>DATE</u>	<u>SOURCE AND TYPE</u>	<u>INCOME</u> (yours, not spouse's)
1. 2014	Georgetown University Law Center- teaching	\$5,000.00
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.)*

<u>DATE</u>	<u>SOURCE AND TYPE</u>
1. 2014	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.)*

<u>SOURCE</u>	<u>DATES</u>	<u>LOCATION</u>	<u>PURPOSE</u>	<u>ITEMS PAID OR PROVIDED</u>
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.)*

<u>SOURCE</u>	<u>DESCRIPTION</u>	<u>VALUE</u>
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.)*

<u>CREDITOR</u>	<u>DESCRIPTION</u>	<u>VALUE CODE</u>
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					Sold (part)	05/20/14	J		
5. - Janus Fund					Sold	05/19/14	J		
6. -PONDY Pimco					Buy	05/19/14	J		
7. -LISOX Lazard					Buy	05/19/14	J		
8. - SFLNX Schwab Fundamental large					Buy	05/19/14	J		
9. - SFSNX Schwab Fundamental small					Buy	05/19/14	J		
10. Schwab One Account #1 (H)									
11. Janus Fund	D	Dividend	L	T					
12. Baker & Hostetler retirement account	E	Dividend	M	T					
13. - Fid Growth Co K									
14. - PIM Total Rt Inst					Sold	12/17/14	J	A	
15. -MetWest Tot Rtn Bd 1					Buy	12/17/14	J		
16. - Spartan 500 Index									
17. - Baker & Hostetler Composite Fund									

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 H ~\$1,000,001 - \$5,000,000	D ~\$5,001 - \$15,000 I ~\$15,001 - \$50,000	E ~\$15,001 - \$50,000 F ~\$50,001 - \$100,000
2. Value Codes (See Columns C1 and D3)	J ~\$15,000 or less N ~\$250,001 - \$500,000 P ~\$250,001 - \$500,000	K ~\$15,001 - \$50,000 O ~\$500,001 - \$1,000,000	P ~\$1,000,001 - \$5,000,000 Q ~\$5,000,001 - \$25,000,000	R ~\$25,000,001 - \$50,000,000 S ~\$50,000,001 - \$100,000,000	T ~\$100,000,001 - \$250,000,000 U ~\$250,000,001 - \$500,000,000
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. - WFA Govt Securities									
19. Schwab Muni account (H)									
20. Arizona St Transn 5%/23	B	Interest	K	T					
21. Austin Tex Wtr & WA 5%/22	B	Interest	K	T					
22. California ST 5%/24	B	Interest	K	T					
23. Fairfax County 5%/22	A	Interest	K	T					
24. Energy Northwest WA 5%/21	B	Interest			Sold	07/30/14	K	B	
25. Florida ST Brd Ed 5%/25%	B	Interest			Sold	10/21/14	K	B	
26. Long Island PWR AUT5%/19	A	Interest			Sold	01/17/14	K	C	
27. Louisiana PUB FACS 5%/19	B	Interest			Sold	08/08/14	K	C	
28. Lower Col River 5%/21	B	Interest	K	T					
29. Miami-Dade CNTY FLA 5%/22	B	Interest	K	T					
30. Michigan St Hosp. FI 5%/25	B	Interest	K	T					
31. Michigan ST Trun 5.25%/21	B	Interest	K	T					
32. MN ST GEN FD 5%/26	B	Interest	K	T	Buy	01/29/14	J		
33. New Jersey Economic 5%/26	B	Interest	K	T					
34. New Jersey Turnpike 5%/30 TPK	A	Interest	K	T	Buy	05/05/14	K		

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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. New York NY 5%22	B	Interest	K	T					
36. New York NY 5%23	B	Interest	K	T					
37. New York St Dorm 5%23		None	K	T	Buy	10/24/14	K		
38. Norfolk VA Wtr Rev 5%20	B	Interest	K	T					
39. Norfolk VA Wtr REv 5%23	B	Interest	K	T					
40. North Carolina Mun 5%/24	A	Interest	K	T					
41. Richmond VA Pub	A	Interest	K	T					
42. San Fransico Calf 5%23	B	Interest	K	T					
43. South Carolina Tran 5%21	B	Interest	K	T					
44. Virginia College BL 5%19	A	Interest			Sold	01/28/14	K	B	
45. Virginia College Bl 5%20	B	Interest	K	T					
46. Virginia Commonwealth TR 5%24	B	Interest	K	T					
47. Virginia ST PUB BLD 5%21	A	Interest	J	T					
48. Virginia St. PUB Bldg 5%24		None	K	T	Buy	08/29/14	K		
49. Virginia ST PUB SCH 5%20	B	Interest	K	T					
50. Virginia ST RES AUT 5%20	A	Interest			Sold	10/07/14	K	C	
51. Virginia ST RES AUT 5%20	A	Interest	K	T					

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52. Virginia ST. RES AUT 5%20	B	Interest	K	T					
53. Virginia ST RES Aut 5%21	A	Interest	K	T					
54. Virginia ST RES Aut 5%22	B	Interest	K	T					
55. Virginia ST RES Aut 5%26	B	Interest	L	T	Buy	07/31/14	L		
56. Virginia St Res Aut 5%26	A	Interest	K	T					
57. Schwab 1 Account # 2 (H)									
58. JP Morgan Chase common stock	A	Dividend	L	T					
59. Walgreen Company common stock	A	Dividend	K	T					
60. Schwab Cash Reserves	A	Dividend	J	T					
61. Templeton Dragon Fund	D	Dividend	K	T					
62. PIMCO Total Return Fund	B	Dividend	M	T					
63. Matthews India Fund	A	Dividend	K	T					
64. Schwab Total Stock Mkt	B	Dividend	N	T					
65. Vanguard Value Index	D	Dividend	N	T					
66. Yacktman Fund	E	Dividend	O	T					
67. ISHARES MSCI CDA IDX FD	A	Dividend	K	T					
68. SCHW INTL EQ ETF	A	Dividend	L	T					

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69. Oppenheimer Equity	C	Dividend	M	T					
70. Schwab Rollover IRA #2	E	Dividend	O	T					
71. - Templeton Dragon Fund									
72. - PIMCO Total Return Fund									
73. - Blackrock Latin America									
74. - Matthews India Fund									
75. - Oppenheimer Equity Income Fund									
76. - Schwab Total Stock MKT									
77. - SCW INTL EQ ETF									
78. - Yacktman Fund									
79. Schwab One Account #3 (H)									
80. EGshares ETF Beyond BRICS		None	J	T	Buy	04/16/14	J		
81. EGshares ETF Emerging Markets		None	J	T	Sold (part)	04/16/14	J	A	
82. IShares AAA Rated corporate bond (ETF)	A	Dividend	J	T	Buy (add'l)	06/12/14	J		
83. IShares Gold Trust		None	J	T	Buy (add'l)	06/12/14	J		
84. Ishares MSCI Germany	A	Dividend	J	T	Sold (part)	08/24/14	J	A	
85.					Sold (part)	02/12/14	J	A	

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86. IShares MSCI HK IDX FD	A	Dividend	J	T	Sold (part)	08/20/14	J		
87. ISHARES RUSEELL 2000	A	Dividend	J	T	Sold (part)	02/06/14	J	B	
88. ISHARES MSCU UTD KINGDOM	A	Dividend			Sold	10/09/14	J	A	
89. I Shares TR Bond (Barclays)	A	Dividend	J	T	Sold (part)	06/06/14	J		
90.					Buy	02/06/14	J		
91. Pimco ETF High Yield Corporate	A	Dividend			Sold	07/10/14	J	A	
92.					Buy	02/06/14	J		
93. POWERSHS DB Commodity Index		None	J	T	Sold (part)	10/23/14	J		
94.					Buy (add'l)	06/12/14	J		
95. Power SHS S&P ETF 500	A	Dividend	J	T	Sold (part)	10/23/14	J	A	
96. PowerSHS QQQ Trust SER 1	A	Dividend	J	T	Sold (part)	10/09/14	J	B	
97.					Buy (add'l)	07/10/14	J		
98.					Sold (part)	02/02/14	J	A	
99. SPDR S&P 500 ETF TR	A	Dividend	J	T	Sold (part)	06/12/14	J	A	
100. Vanguard DIV Appreciation	A	Dividend	J	T	Buy (add'l)	06/06/14	J		
101.					Sold (part)	02/06/14	J	A	
102. Vanguard Charlotte ETF	A	Dividend	J	T	Buy	10/09/14	J		

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103. Vanguard MSCI Emerging	A	Dividend	J	T					
104. Vanguard MSCI EAFE ETF (VEA)Developed markets	A	Dividend	J	T	Buy (add'l)	10/23/14	J		
105. Vanguard REIT	A	Dividend	J	T	Buy (add'l)	06/06/14	J		
106. Vanguard Total Stock MKT	A	Dividend	J	T	Sold (part)	06/12/14	J	A	
107. Vanguard Int.Equity	A	Dividend	J	T	Buy (add'l)	07/10/14	J		
108. Vanguaard FTSE Emerging	A	Dividend	J	T					
109. Widsontree Asia ETF Local Debt Fund	A	Dividend	J	T	Sold (part)	04/16/14	J		
110. Schwab Cash Reserves	A	Dividend	J	T					
111. Windsom Trust Brazil		None			Sold	01/27/14	J		
112. Windsom Trust JPN Hedge Equity		None			Sold	07/10/14	J	A	
113.					Sold (part)	06/06/14	J	A	
114. Windsom India Earning	A	Dividend	J	T	Buy	06/09/14	J		
115. Schwab High Yield Investor Savings (closed)	A	Interest	N	T					
116. DWS Large Cap Value Fund-S	D	Dividend	M	T					
117. Bank of America Series of accounts	A	Interest	O	T					
118. American Express Savings Account	C	Interest	N	T					
119. Capitol One Savings Account	C	Interest	O	T					

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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)

120. Discover Bank Savings Account	B	Interest	M	T					
121. EDSC Limited Partnership	D	Rent	M	W					
122.	E	Interest							
123. NSP Limited Partnership	E	Rent	N	W					
124. VSSC Limited Partnership	E	Rent	M	W					
125. THSC Limited Partnership	E	Rent	N	W					
126. Falstaff Center LLP		None	M	W					
127. PHSA Medical Center LLC	E	Rent	N	W					
128.	A	Interest							
129. Valley Ranch Investors LLC		None	M	W	Buy	10/15/14	M		

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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Name of Person Reporting

Kerrigan, Kathleen M.

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

In Part VII. Investments and Trusts, lines 121 through 129 are all limited partnership investments in real estate.

In Part VII Investments and Trusts, lines 19-56 are tax exempt bonds in a Schwab account managed by GW&K investment management

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Name of Person Reporting

Kerrigan, Kathleen M.

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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