

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) Marvel, L. Paige	2. Court or Organization United States Tax Court	3. Date of Report 12/03/2015
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) 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 UNITED STATES TAX COURT 400 SECOND STREET, 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.)

	<u>POSITION</u>	<u>NAME OF ORGANIZATION/ENTITY</u>
1.	Partner	Partnership #1
2.	Custodian	529 Acct. #4
3.	Trustee	REH Irrevocable Trust
4.	Trustee	LHH Revocable Trust
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.		

FINANCIAL DISCLOSURE REPORT

Page 2 of 20

Name of Person Reporting

Marvel, L. Paige

Date of Report

12/03/2015

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.		
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	Maryland State Retirement Agency distribution (457 Plan)
2. 2014	Maryland Teachers and State Employees distribution
3. 2014	Fidelity Rollover IRA distribution
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. American Bar Association	12/10/14 - 12/12/14	Las Vegas, NV	To speak at ABA Tax Section's Natl. Institute on Criminal Tax Fraud & Tax Controversy	Flight, Taxi, Lodging, Meals & Incidentals
2. University of Houston Law Foundation	01/23/14 - 01/25/14	Houston, TX	To judge Moot Court National Championship	Flight, Taxi, Lodging, Meals & Incidentals
3.				
4.				
5.				

FINANCIAL DISCLOSURE REPORT

Page 3 of 20

Name of Person Reporting

Marvel, L Paige

Date of Report

12/03/2015

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.	Aspen Publishers	Complimentary copy, Mergers, Acquisitions & Buyouts, and update for prof. use	\$600.00
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.	Washington University in St. Louis	Tuition Payment Plan Loan	K
2.	U.S. Dept. of Education	Student Loans	J
3.	Washington University in St. Louis	Student Loans	J
4.	Emory University	Student Loans	J
5.			

FINANCIAL DISCLOSURE REPORT

Page 4 of 20

Name of Person Reporting

Marvel, L Paige

Date of Report

12/03/2015

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. 33% pship. interest, Margaret's Landing Partnership		None	K	W					
2. USAA Subscribers Savings Account	B	Distribution	J	T					
3. USAA Fed. Savings Bank Accts. #1	A	Interest	J	T					
4. USAA Fed. Savings Bank Accts. #2	A	Interest	J	T					
5. M&T Bank accts. #1	A	Interest	J	T					
6. M&T Bank accts. #2	A	Interest	J	T					
7. T. Rowe Price Acct. (H):									
8. -Growth Stock Fund	D	Distribution	L	T					
9. -Maryland Bond Fund	A	Dividend	J	T					
10. RBC Brokerage Acct. (H):									
11. -Shares, AT&T Inc.	A	Dividend	J	T					
12. -Common, Bristol Myers Squibb Co.	A	Dividend	K	T					
13. -Common, Centerpoint Energy Inc. (X)	A	Dividend	J	T					
14. -Shares, Covidien PLC	A	Dividend	K	T					
15. -Common, Exxon Mobil Corp	C	Dividend	L	T					
16. -Common, Fresenius Med Care Aktiengesellschaft ADR	A	Dividend	K	T					
17. -Common, General Electric Co.	A	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 \$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	

FINANCIAL DISCLOSURE REPORT

Page 5 of 20

Name of Person Reporting

Marvel, L Paige

Date of Report

12/03/2015

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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. -Shares, Mallinckrodt PLC		None	J	T					
19. -Shares, Pentair PLC (name change)	A	Dividend	J	T					
20. -Common, Pfizer Inc.	A	Dividend	J	T					
21. -Shares, PNC Financial Services Group, Inc.	A	Dividend	J	T					
22. -Shares, TE Connectivity Ltd.	A	Dividend	K	T					
23. -Shares, Tyco Intl PLC (name change)	A	Dividend	J	T					
24. -Shares, UDR Inc.	B	Dividend	K	T					
25. -Shares, Verizon Communications	A	Dividend	J	T					
26. -Shares, U.S. Govt. Money Mkt. Fund RBC Reserve Class	A	Dividend	J	T	Sold (part)	01/02/14	J		
27.					Sold (part)	02/15/14	J		
28.					Sold (part)	02/24/14	J		
29.					Sold (part)	03/18/14	J		
30.					Sold (part)	04/25/14	J		
31.					Sold (part)	05/16/14	J		
32.					Sold (part)	05/21/14	J		
33.					Sold (part)	06/23/14	J		
34.					Sold (part)	07/01/14	J		

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		

FINANCIAL DISCLOSURE REPORT

Page 6 of 20

Name of Person Reporting

Marvel, L Paige

Date of Report

12/03/2015

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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)	07/22/14	J		
36.					Sold (part)	07/14/14	J		
37.					Sold (part)	07/19/14	J		
38.					Sold (part)	08/12/14	J		
39.					Sold (part)	09/25/14	J		
40.					Sold (part)	10/24/14	J		
41.					Sold (part)	11/21/14	J		
42.					Sold (part)	12/20/14	J		
43.					Sold (part)	03/27/14	J		
44.					Sold (part)	04/04/14	J		
45.					Sold (part)	12/24/14	J		
46.	Fidelity Brokerage Rollover IRA (H):								
47.	-Fidelity New Markets Income	C	Dividend	K	T				
48.	-Spartan 500 Index	C	Dividend	L	T				
49.	-Fidelity Strategic Real Return	A	Dividend	J	T				
50.	-Fidelity Contrafund	D	Dividend	M	T				
51.	-Fidelity Equity-Income	C	Dividend	L	T				

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FINANCIAL DISCLOSURE REPORT

Page 7 of 20

Name of Person Reporting

Marvel, L Paige

Date of Report

12/03/2015

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52. -Fidelity GNMA Fund	A	Dividend	K	T					
53. -Fidelity Government Income	A	Distribution	J	T					
54. -Fidelity New Millenium	B	Dividend	K	T	Buy	04/17/14	K		
55. -Fidelity Low-Priced Stock	C	Dividend	M	T	Sold (part)	04/17/14	K	D	
56. -Fidelity Select Biotechnology	D	Dividend	L	T	Sold (part)	03/27/14	J	C	
57. -Fairholme Fund	B	Dividend	K	T					
58. -Oakmark Select I	B	Dividend	K	T					
59. -Loomis Sayles Bond Retail Shares	B	Dividend	K	T	Buy (add'l)	04/03/14	J		
60. -Pimco Real Return Class D	A	Dividend	J	T	Sold (part)	04/03/14	J	A	
61. -Permanent Portfolio	B	Dividend	J	T					
62. -Vanguard Inflation Protected Secs.	A	Dividend	K	T					
63. -Wasatch Ultra Growth	A	Dividend	J	T					
64. -Wasatch International Growth	B	Dividend	K	T					
65. -Shares, Seaspan Corp.	A	Dividend	J	T					
66. -Shares, Berkshire Hathaway Inc. Cl B		None	K	T					
67. -CPFL Energia S A Sponsored ADR	A	Dividend	J	T					
68. -Shares, Dendreon Corp.		None			Buy (add'l)	03/27/14	J		

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FINANCIAL DISCLOSURE REPORT

Page 8 of 20

Name of Person Reporting

Marvel, L. Paige

Date of Report

12/03/2015

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69.					Sold	08/15/14	J		
70. -Shares, EMC Corp.	A	Dividend	J	T					
71. -Shares, First Tr ISE Chindia Index FD	A	Dividend	J	T					
72. -Shares, Goldman Sachs Group Inc.	A	Dividend	K	T					
73. -Shares, Greenhaven Continuous Commodity Index Fund		None	J	T					
74. -ISHARES INC. MSSCI Bric Index Fund	A	Dividend	J	T					
75. -ISHARES INC. MSCI Singapore Index FD	A	Dividend	J	T					
76. -ISHARES INC. MSCI Malaysia Free Index FD	A	Dividend	J	T					
77. -JPMorgan Chase & Co. Alerian MLP Index ETN	A	Interest	J	T					
78. -Common, Lundin Mng Corp.	A	Dividend	J	T					
79. -Shares, Potash Corp Sask Inc.	A	Dividend	J	T					
80. -Shares, Vale S A ADR	A	Dividend	J	T					
81. -Shares, Wisdomtree Emerg. Mkts Equity Income Fund	A	Dividend	J	T					
82. -Shares, Federal Realty Invst Tr. Sh. Ben. Int.	A	Dividend	J	T					
83. -Shares, Kimco Realty Corp.	A	Dividend	J	T					
84. -Fidelity Cash Reserves	A	Dividend	J	T	Buy (add'l)	03/28/14	J		
85.					Buy (add'l)	04/03/14	J		

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FINANCIAL DISCLOSURE REPORT

Page 9 of 20

Name of Person Reporting

Marvel, L Paige

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86.					Sold (part)	04/04/14	J		
87. T.RowePrice Rollover IRA (H):									
88. -T. Rowe Price Capital Appreciation	D	Dividend	L	T					
89. -Rowe Price Emerging Markets Stock	A	Dividend	K	T					
90. -Rowe Price Equity Income	D	Dividend	M	T					
91. -Rowe Price Equity Index 500	B	Dividend	L	T					
92. -Rowe Price Health Sciences	D	Distribution	L	T					
93. -Rowe Price International Discovery	C	Dividend	L	T					
94. -Rowe Price Latin America	C	Dividend	K	T					
95. -Rowe Price Mid-Cap Value	B	Dividend	K	T					
96. -Rowe Price New Asia	B	Dividend	K	T					
97. -Rowe Price New Horizons	B	Distribution	K	T					
98. -Rowe Price Science & Technology	A	Distribution	J	T					
99. -Rowe Price Small-Cap Value	C	Dividend	K	T					
100. -Rowe Price Emerging Markets Bond	B	Dividend	K	T					
101. -Rowe GNMA	A	Dividend	J	T					
102. -Rowe High Yield	B	Dividend	K	T					

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FINANCIAL DISCLOSURE REPORT

Page 10 of 20

Name of Person Reporting

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103. -Rowe US Treasury Intermediate	A	Dividend	K	T					
104. Fidelity Traditional IRA Acct. (H):									
105. -Shares, CNOOC Limited ADS EACH REP 100 ORD HKDO 02	A	Dividend	J	T					
106. -Common, Berkshire Hathaway		None	L	T					
107. -Shares, Seaspac Corporation	A	Dividend	J	T					
108. -Common, Vaalco Energy Inc.		None	J	T					
109. -Dreyfus Opportunistic Midcap Value CL A Fund	B	Distribution	K	T					
110. -Teton Westwood Mighty Mites FD	A	Distribution	K	T					
111. RBC IRA Acct. (H):									
112. -Ishares Tr Nasdaq Biotech Index Fund	A	Dividend	J	T					
113. -Powershares QQQ Trust Unit Ser. 1	A	Dividend	J	T					
114. MD State Retirement Plan - Sec. 457(b) Acct. (H):									
115. -Shares, Euro Pacific Growth Fund A	A	Dividend	J	T					
116. -Shares, Investment Contract Pool	A	Dividend			Sold	06/20/14	J		
117. -Shares, PIMCO Total Return Fund	B	Dividend	K	T					
118. -Shares, Vanguard Intl. Index Fund	B	Dividend	J	T					
119. IRA Accts. - American Century (H):									

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	

FINANCIAL DISCLOSURE REPORT

Page 11 of 20

Name of Person Reporting

Marvel, L Paige

Date of Report

12/03/2015

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. -Equity Income Stock Fund	B	Dividend	K	T					
121. -Emerging Markets Stock Fund	A	Dividend	K	T					
122. -CMG Focus Fund	A	Dividend	J	T					
123. IRA Acct. - Greenspring Fund, Inc.	A	Dividend	K	T					
124. SEP Acct. - Greenspring Fund, Inc.	B	Dividend	K	T					
125. RBC Roth IRA (H):									
126. -Shares, Nationwide Mut Fds New Highmark Value FD (renamed)	B	Dividend	J	T					
127. Vanguard Rollover IRA (H):									
128. -Shares, Convertible Securities	B	Dividend	K	T					
129. -Shares, Dividend Growth Fund	B	Dividend	K	T					
130. -Shares, Wellesley Income Fund	B	Dividend	K	T					
131. RBC Joint Brokerage Acct. (H):									
132. -Common, Apple, Inc.	A	Dividend	K	T					
133. -Common, Walt Disney Co.	A	Dividend	K	T					
134. -US Govt. Money Market Fund RBC Reserve Class	A	Dividend	J	T					
135. USAA Investment Acct. (H):									
136. -USAA Cornerstone Moderate Fund (formerly Balanced Str.)	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 = \$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	

FINANCIAL DISCLOSURE REPORT

Page 12 of 20

Name of Person Reporting

Marvel, L Paige

Date of Report

12/03/2015

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. -USAA Value Fund	A	Dividend	J	T					
138. RBC IRA/A Acct. (H):									
139. -Shares, Advent Claymore Conv Sec & Income Fund	B	Dividend	K	T					
140. -Shares, Alps ETF Tr Alerian MLP	B	Dividend	K	T					
141. -Common, Amgen Inc.	A	Dividend	K	T					
142. -Shares, BCE Inc. New	B	Dividend	K	T					
143. -Shares, Blackrock Global Energy and Resources Trust	B	Dividend	K	T					
144. -Common, Caterpillar Inc.	B	Dividend	K	T					
145. -Note, Citigroup Inc. 6.875% SER K DEP SHS REPSTG 1/1000TH INT	A	Int./Div.	K	T	Buy	09/11/14	K		
146. -Shares, Compass Diversified Trust	C	Distribution	K	T					
147. -Shares, Cushing Renaissance Fund	B	Dividend	K	T					
148. -Shares, Cushing Royalty & Income Fund	C	Dividend	J	T					
149. -Shares, Eaton Vance Tax Advantaged Dividend Income Fund	B	Dividend	K	T					
150. -Shares, Frontier Communications Corp Ser B	A	Dividend	J	T					
151. -Common, Gasco Energy Inc.		None			Sold	07/01/14	J		
152. -Notes, General Electric Cap Corp., Due 5/13/14, 5.9%	A	Interest			Redeemed	05/13/14	J		
153. -Common, General Electric Co.	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 = \$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	

FINANCIAL DISCLOSURE REPORT

Page 13 of 20

Name of Person Reporting

Marvel, L Paige

Date of Report

12/03/2015

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. -Shares, Goldman Sachs Group Inc. Dep Shs Repstg 1/1000 Pfd Ser D	B	Dividend			Sold	09/11/14	K		
155. -Shares, iShares International Select Dividend ETF	B	Dividend	K	T	Buy	03/21/14	K		
156. Shares, Kinder Morgan Inc.		None	K	T	Open	12/20/14	K		
157. -LP Unit, Kinder Morgan Energy Partners LP	B	Distribution			Merged (with line 156)	12/20/14	K		
158. -Note, Lowes Cos. Inc., Due 9/15/17, 6.1%	A	Interest	K	T					
159. -Shares, MFS Value Fund A	B	Dividend	K	T	Buy (add'l)	12/12/14	J		
160. -Common, Microsoft Corp.	A	Dividend	J	T					
161. -Shares, Novartis A G ADR	A	Dividend	K	T					
162. -Common, Pepsico Incorporated	A	Dividend	K	T					
163. -Common, Sysco Corporation	A	Dividend	J	T					
164. -Common, Under Armour Inc. CL A		None	J	T	Buy	09/11/14	J		
165. -Shares, Vanguard Intl. Eq. Index FDS Emerg. Markets Fund	A	Dividend	K	T					
166. -Shares, Vanguard Sector Index FDS - Vanguard Industrials ETF	A	Dividend	K	T	Buy	09/11/14	K		
167. -Shares, Vanguard Sect. Index FDS Information Technology ETF	A	Dividend	K	T					
168. -Common, Verizon Communications	A	Dividend	J	T					
169. -Shares Victory Portfolios Munder Growth Opportunities FD C	A	Distribution	J	T					
170. -Shares, US Govt. Money Market Fund (RBC)	A	Distribution	K	T	Buy (add'l)	03/21/14	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 \$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	

FINANCIAL DISCLOSURE REPORT

Page 14 of 20

Name of Person Reporting

Marvel, L. Paige

Date of Report

12/03/2015

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.					Redeemed (part)	03/26/14	K		
172.					Redeemed (part)	09/16/14	K		
173.					Buy (add'l)	09/24/14	J		
174.					Buy (add'l)	12/03/14	J		
175.					Buy (add'l)	12/24/14	J		
176.					Buy (add'l)	12/26/14	J		
177. RBC IRA/B Acct. (H):									
178. -Common, AT&T Inc.	B	Dividend	K	T					
179. -Shares, Blackrock Resources & Commodities Strategy Trust	A	Dividend	J	T	Open	12/09/14	J		
180. -Shares, Blackrock Ecosolutions Investment Trust	A	Dividend			Merged (with line 179)	12/09/14	J		
181. -Common, Bristol Meyers Squibb Co.	A	Dividend	K	T					
182. -Common, Callaway Golf Co.	A	Dividend	J	T					
183. -Shares, Cohen & Steers Infrastructure Fund Inc.	B	Dividend	K	T					
184. -Common, ConocoPhillips	A	Dividend			Sold	09/11/14	K	D	
185. -Common, Eli Lilly & Co.	A	Dividend	K	T					
186. -Shares, Gabelli Dividend & Inc Trust	B	Dividend	K	T	Distributed (part)	06/24/14	J		
187. Shares, Gabelli Global Small & Mid Cap Value Tr Com		None	J	T	Open	06/24/14	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	

FINANCIAL DISCLOSURE REPORT

Page 15 of 20

Name of Person Reporting

Marvel, L. Paige

Date of Report

12/03/2015

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)
188. -Common, General Mills, Inc.	A	Dividend	K	T					
189. -Common, Gladstone Commercial Corporation	B	Dividend	K	T					
190. -Common, Johnson & Johnson	A	Dividend	K	T					
191. -Common, Kinder Morgan Inc.	A	Dividend	K	T	Buy	09/11/14	K		
192. -Shares, Pembina Pipeline Corp.	A	Distribution	K	T					
193. -Shares, Pimco Dynamic Income Fund	C	Dividend	K	T					
194. -Shares, Vanguard World Funds- Vanguard Health Care ETF	A	Dividend	L	T					
195. -Shares Victory Portfolios Munder Growth Opportunities A		None	J	T					
196. -Shares, US Govt. Money Market Fund RBC Reserve Class	A	Dividend	K	T	Buy (add'l)	01/21/14	J		
197.					Buy (add'l)	06/23/14	J		
198.					Buy (add'l)	09/16/14	J		
199. Rollover IRA - USAA FSB (H):									
200. -Shares, USAA Value Fund	A	Dividend	J	T					
201. Vanguard Investment Acct. (H):									
202. -Shares, Vanguard Energy Fund		None			Buy	06/30/14	J		
203.					Sold (part)	09/18/14	J		
204.					Sold	09/18/14	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	

FINANCIAL DISCLOSURE REPORT

Page 16 of 20

Name of Person Reporting

Marvel, L Paige

Date of Report

12/03/2015

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)
205. -Shares, Inflation-Protect Sec Inv.	A	Dividend	J	T	Buy	06/30/14	J		
206. -Shares, Balanced Index Fund	A	Dividend	K	T	Buy	06/30/14	J		
207.					Buy (add'l)	09/18/14	J		
208.					Buy (add'l)	12/05/14	J		
209. -Shares, Total Intl Stock	A	Dividend			Buy	06/30/14	J		
210.					Sold (part)	09/18/14	J		
211.					Sold	09/18/14	J		
212. -Shares, Small-Cap Value Fund	A	Dividend	J	T	Buy	06/30/14	J		
213. -Shares, U.S. Growth Fund	B	Distribution	K	T	Buy	07/02/14	J		
214.					Buy (add'l)	09/18/14	J		
215.					Buy (add'l)	12/05/14	J		
216. [REDACTED] 1 RBC Acct. (H):									
217. -Shares, Berkshire Hathaway CL B Inc.		None	K	T					
218. [REDACTED] 2 RBC Acct. (H):									
219. -Shares, Berkshire Hathaway CL B Inc.		None	K	T					
220. 529 Acct. - Vanguard [REDACTED] Income Fund	A	Dividend	J	T					
221. REH Irrevocable Trust (H):									

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	

FINANCIAL DISCLOSURE REPORT

Page 17 of 20

Name of Person Reporting

Marvel, L Paige

Date of Report

12/03/2015

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

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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 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)
222. - Fidelity Inherited IRA (H):									
223. --Shares, Spartan US Bond Index Fund (corrected name)	A	Dividend			Sold	12/17/14	K	D	
224. --Shares, Fidelity Focused Stock Fund	B	Dividend	J	T	Sold (part)	12/17/14	J	A	
225. --Shares, Fidelity Low Priced Stock Fund	C	Dividend	L	T					
226. --Fidelity Cash Reserves	A	Dividend	J	T					
227. -Promissory Note from Vicki A. Marvel, 6%	A	Interest	L	T					
228. -M&T Money Market Acct.	A	Interest	M	T					
229. LHH Revocable Trust (H)::									
230. -Fidelity Roth IRA (H):									
231. --Shares, Fidelity Contrafund	A	Distribution	K	T					
232. --Share, Fidelity Focused Stock Fund	A	Dividend	J	T	Buy	01/13/14	J		
233. --Shares, Fidelity Intern. Govt. Income	A	Dividend			Sold	01/13/14	J	A	
234. --Shares, Fidelity Select Biotechnology	A	Dividend	J	T					
235. -M&T Money Market Acct.	A	Interest	M	T					
236. -TIC Fidelity Trust Acct (H)::									
237. --Shares, Fidelity Municipal Inc.	B	Dividend	K	T					
238. --Shares, Fidelity Government Income	A	Dividend	J	T					

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		

FINANCIAL DISCLOSURE REPORT

Page 18 of 20

Name of Person Reporting

Marvel, L Paige

Date of Report

12/03/2015

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

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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 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)

239. --Shares, Fidelity Intermediate Muni Income	A	Dividend	J	T					
240. --Fidelity Cash Reserves	A	Dividend	J	T					
241. --Bank of Oklahoma (BOO) Checking Acct.	A	Interest	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	

FINANCIAL DISCLOSURE REPORT

Page 19 of 20

Name of Person Reporting

Marvel, L Paige

Date of Report

12/03/2015

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

2014 Report, Part III-A. During 2014, I was awaiting final Senate action on my nomination for a second term on the U.S. Tax Court. Because my original term had already expired, I was serving in the capacity of "senior judge" and my compensation was treated as retirement pay. I have not listed the compensation paid to me as retirement pay because the instructions do not appear to require it. I was ultimately confirmed by the U.S. Senate and I took the oath of office for my second term in December 2014, at which time I became an active (non-retired status) judge.

2014 Report, Part VI. The liabilities listed in Part VI of prior year reports are student loans and deferred tuition obligations that are technically liabilities of [REDACTED]. Because [REDACTED] did not qualify as [REDACTED] for 2014 within the meaning of IRC section 152, I have omitted those liabilities from the 2014 Report.

2014 Report, Part VII; 2014 Amended Report; 2013 Amended Report, lines 200-209: Because neither of [REDACTED] qualified as [REDACTED] within the meaning of IRC section 152 for 2014 and we did not claim dependency exemptions for them, I have deleted their assets from this report. The assets in question were included in my 2013 Amended Report at lines 200-209.

2014 Report, Part VII. For investments that generated both dividend and capital gain income during 2014, I have aggregated the amounts on the appropriate income lines and described the income as "dividends". For investments that generated only capital gain income, I have described the income as "distribution". paid both dividends and capital gains, I have aggregated the amounts on the appropriate income lines and described the income as "dividends". For investments that paid only capital gains, I have described the income as "distribution".

2014 Report, Part VII. During 2014, any investment previously described as Munder Growth Opportunities Fund C is now described as "Victory Portfolios Munder Growth Opportunities FD C". The funds were "exchanged" according to the monthly report but it appears to be a change in name only.

2014 Report, Part VII, lines 5 and 6. Both [REDACTED] and I have accounts at this bank that I aggregated in filing previous reports. Because the instructions require a different aggregation, I have reported the bank accounts of each person on separate lines in the 2014 Report.

2014 Report, Part VII, lines 186 and 187: The new fund investment was spun off from the older listing during 2014.

2014 Report, Part VII, lines 216-219: These custodial accounts belong to [REDACTED] but are listed because they have not yet been transferred out of the custodial accounts into accounts in their names.

2014 Report, Part VII, line 220: The only 529 account that is reportable for 2014 is listed on line 220. The 2013 Amended Report included other 529 accounts at lines 210-213 but those accounts did not meet the reporting requirements for 2013 and 2014, and are excluded on this report.

2014 Report, Part VII, line 225, 2014 Amended Report, line 225, and 2013 Amended Report (no comparable listing): In this Amended Report, I have kept line 225 as originally reported. It appears that I accidentally omitted that item from my 2013 Amended Report (I believe it was reported on my 2012 Reports but I have not checked them). Please consider this an amendment to my 2013 Reports because the investment listed at line 225 of both my original 2014 Report and my 2014 Amended Report existed in 2013 and should have been disclosed.

2014 Amended Report, Part VII, line 240: In accordance with your letter dated November 4, 2015, this line item has been amended to include the information in Column C.

2014 Amended Report, Part VII; 2013 Amended Report, lines 227 and 228: The investments listed on my 2013 Amended Report at lines 227 and 228 were sold during 2013 but I mistakenly failed to report the sales. Item 227 was sold on June 26, 2013; the codes for part D are (1) Sold; (2) 06/26/2013, (3) L, (4) D. Item 228 was sold on June 27, 2015; the codes for part D are (1) Sold, (2) 06/27/13, (3) K, and (4) no entry as it was sold at a loss. The proceeds of these sales were used to purchase the assets listed on my 2013 and 2014 Amended Reports as Fidelity Focused Stock Fund and Fidelity Low Priced Stock Fund.

FINANCIAL DISCLOSURE REPORT

Page 20 of 20

Name of Person Reporting

Marvel, L Paige

Date of Report

12/03/2015

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/ L Paige Marvel

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
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