

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2008

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) Bartle III, Harvey	2. Court or Organization U.S. District Court, E.D. Pa.	3. Date of Report 05/11/2009
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Chief U.S. District Judge	5a. Report Type (check appropriate type) ☐ Nomination, Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2008 to 12/31/2008
7. Chambers or Office Address 16614 U.S. Courthouse 601 Market Street Philadelphia, PA 19106	8. On the basis of the information contained in this Report and any modifications pertaining thereto, it is, in my opinion, in compliance with applicable laws and regulations. Reviewing Officer _____ Date _____	
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. Sign on last page.		

I. POSITIONS. (Reporting individual only; see pp. 9-13 of filing instructions.)

☐ NONE (No reportable positions.)

POSITION	NAME OF ORGANIZATION/ENTITY
1. [REDACTED]	[REDACTED]
2. Co-Trustee	Trusts under Will
3. Co-Executor	Co-Executor under Will
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.)

<u>DATE</u>	<u>SOURCE AND TYPE</u>	<u>INCOME</u> (yours, not spouse's)
1. 2008	Co-Trustee Fee	\$7,000.00
2. 2008	Co-Executor Fee	\$18,000.00
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. 2008	Texas Teachers Retirement System
2. 2008	[REDACTED] - Salary
3. 2008	[REDACTED] Consulting Fee
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. Pennsylvania Bar Association	1/29-30/08	Las Croabas, Puerto Rico	Guest Speaker	Cab fares to and from airports, one night's lodging, and meals (Midyear Meeting)
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. The Philadelphia Bar Association	Membership (extended to all judges)	\$365
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 Month - Day	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
1. Eastman Kodak (Com.)	A	Dividend	J	T					
2. General Motors	A	Dividend	J	T					
3. IBM (Com.)	A	Dividend	K	T					
4. Xerox (Com.)	A	Dividend	J	T					
5. Delphi Automotive Systems (Com.)		None	J	T					
6. Banknorth, Philadelphia, PA	A	Interest	L	T					
7. Vanguard-Windsor II (IRA rollover) (previously)									
8. Dechert Price & Rhoads H.R. 10 Retirement Plan)		None	L	T					
9. Merrill Lynch (Mercury U.S. Large Cap F und Class B)		None	J	T					
10. TIAA/CREF (Retirement Fund)	C	Dividend	N	T					
11. Co-Executor under Will (see attachment)									
12. Trusts under Will (see attachment)									
13. Easton Vance Pa. Mun. Income Trust	A	Interest	J	T					
14. VanKemper Am. Capital Trust	A	Interest	J	T					
15. Wachovia Securities (Account Manager for #12 and #13)									See #13 and #14
16. Vanguard (Wellington Fund)	B	Dividend	L	T					
17. Vanguard (Wellington Fund Admr) (X)	C	Dividend	M	T	Buy Buy	7/21 12/17	K		

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
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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 Month - Day	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
18. Vanguard (Pa. Long Term Tax Exempt Fund)	A	Interest	J	T					
19. Estate 1 (new)									
20. - Altria Group (X)	A	Dividend			Distributed*	12/9	K		
21.					Sold	12/10	J	A	
22. - Aqua America (X)	B	Dividend			Distributed*	12/9	M		
23.					Sold	12/10	K	A	
24.					Sold (part)	12/15	J	A	
25. - Bank of America (X)	B	Dividend			Distributed*	12/9	J		
26.					Sold	12/10	J	A	
27.					Sold (part)	12/15	J	A	
28. - Blackrock PA Strategic Mun (X)	A	Dividend			Sold	8/11	J	A	
29. - Blackrock Mun Yield PA (X)	A	Dividend			Sold	8/11	K	A	
30. - BP (X)	B	Dividend			Distributed*	12/9	L		
31.					Sold	12/10	J	A	
32. - Chevron (X)	C	Dividend			Distributed*	12/9	M		
33.					Sold	12/10	K	B	
34. - Cigna (X)		None			Distributed*	12/9	M		

* 1/3 distributed in kind to the undersigned.

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 = \$250,000.01 - \$500,000.00	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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35.					Sold	12/10	K	C	
36.					Sold (part)	12/15	J	A	
37. - Cisco Systems (X)		None			Distributed*	12/9	J		
38.					Sold	12/10	J	A	
39.					Sold (part)	12/15	J	A	
40. - Citigroup (X)	A	Dividend			Distributed*	12/9	J		
41.					Sold	12/10	J	A	
42.					Sold (part)	12/15	J	A	
43. - Coatesville PA Sch Dist 2.7% (X)	A	Ex. Int.			Sold	6/26	K	A	
44. - Colonial Bank CD 4.65% (X)	C	Interest			Redeemed	6/26	L	A	
45. - DowChemical (X)	B	Dividend			Distributed*	12/9	L		
46.					Sold	12/10	J	A	
47.					Sold (part)	12/15	J	A	
48. - East Lampeter PA Sew 5.6% (X)	A	Ex. Int.			Sold	8/25	J	A	
49. - Easton Vance PA Mun (X)	A	Dividend			Sold	8/11	J	A	
50. - Exelon (X)	B	Dividend			Distributed*	12/9	K		
51.					Sold	12/10	K	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 \$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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52. - Exxon Mobil (X)	A	Dividend			Distributed *	12/9	J		
53.					Sold	12/10	J	A	
54.					Sold (part)	12/15	J	A	
55. - Federal Natl Mtg Assn (X)	A	Dividend			Distributed *	12/9	J		
56.					Sold	12/10	J	A	
57.					Sold (part)	12/15	J	A	
58. - FedEx Corp (X)	A	Dividend			Distributed *	12/9	J		
59.					Sold	12/10	J	A	
60.					Sold (part)	12/15	J	A	
61. - General Electric (X)	C	Dividend			Distributed *	12/9	M		
62. - Intel (X)	A	Dividend			Distributed *	12/9	J		
63.					Sold	12/10	J	A	
64.					Sold (part)	12/15	J	A	
65. - IBM (X)	A	Dividend			Distributed *	12/9	J		
66. - Johnson & Johnson (X)	B	Dividend			Distributed *	12/9	K		
67. - JP Morgan Chase (X)	B	Dividend			Distributed *	12/9	L		
68.					Sold	12/10	K	A	

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(See Columns C1 and D3)

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69. - Lancaster PA Area Sewer 6/0% (X)	A	Ex. Int.			Sold	8/25	J	A	
70. - Merck (X)	A	Dividend			Distributed *	12/9	K		
71.					Sold	12/10	K	A	
72.					Sold (part)	12/15	J	A	
73. - Microsoft (X)	A	Dividend			Distributed *	12/9	J		
74.					Sold	12/10	J	A	
75.					Sold (part)	12/15	J	A	
76. - Nuveen PA Invst Qual Mun Fd (X)	A	Dividend			Sold	8/11	K	A	
77. - Nuveen PA Prem Inc Mun Fd 2 (X)	A	Dividend			Sold	8/11	J	A	
78. - Oracle (X)		None			Distributed *	12/9	J		
79.					Sold	12/10	J	A	
80. - Pepsico (X)	A	Dividend			Distributed *	12/9	K		
81.					Sold	12/10	J	A	
82. - Pfizer (X)	D	Dividend			Distributed *	12/9	N		
83.					Sold	12/10	M	A	
84. - Philip Morris International (X)	B	Dividend			Distributed *	12/9	L		
85.					Sold	12/10	K	A	

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3. Value Method Codes (See Column C2)					

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86. - Praxair (X)	B	Dividend			Distributed	12/9	M		
87.					Sold	12/10	K	A	
88.					Sold (part)	12/15	J	A	
89. - Procter & Gamble (X)	A	Dividend			Distributed*	12/9	K		
90.					Sold	12/10	J	A	
91. Uniontown Area Penn 3.125% (X)	A	Ex. Int.			Sold	8/25	K	A	
92. Van Kampen Amer Cap PA Val Mun (X)	B	Dividend			Sold	8/11	L	A	
93. - Wachovia Bank CD 4.6% (X)	B	Interest			Redeemed	8/25	L	A	
94. - Wachovia Corp (X)	B	Dividend			Distributed*	12/9	K		
95.					Sold	12/10	J	A	
96. - Wachovia Securities Command Mon Mkt (X)	A	Dividend	K	T					
97. - Wal-Mart Stores (X)	A	Dividend			Distributed*	12/9	J		
98.					Sold	12/10	J	A	
99.					Sold (part)	12/15	J	A	
100. - Westernbank CD 4.7% (X)	A	Interest			Redeemed	6/26	L	A	
101. -Weyerhaeuser (X)	A	Dividend			Distributed*	12/9	K		
102.					Sold	12/10	J	A	

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103. - World Savings Bank CD 4.7% (X)	B	Interest	K	T	Distributed * (part)	12/9	L		
104. - World Savings Bank CD 4.85% (X)	B	Interest	K	T	Distributed * (part)	12/9	L		
105. - Kraft Foods (X)	A	Dividend			Distributed *	12/9	K		
106.					Sold	12/10	J	A	

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May-09

VII. Page 1 INVESTMENTS AND TRUSTS -- income, value, transactions (includes those of spouse and children. See pp. 34-57 of Instructions.)

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. Transaction during reporting period				
	(1)	(2)	(1)	(2)	(1)	If not exempt from disclosure			
	Amt: Code1 (A-H)	Type (e.g., div., rent or int.)	Value Code2 (J-P)	Value Method Code3 (Q-W)	Type (e.g. buy, sell, merger, redemption)	(2) Date Month- Day	(3) Value Code2 (J-P)	(4) Gain Code1 (A-H)	(5) Identity of buyer/seller (if private transaction)
☐ NONE (No reportable income)									
1 Trusts under Will									
2 - Abbott Laboratories	A	Div.	K	T					
3 - Altria Group	D	Div.	K	T					
4 - Aqua America	B	Div.	L	T					
5 - Bristol Myers Squibb	C	Div.	L	T					
6 - Capital World Growth & Inc Fd	A	Div.	J	T	bought	1/8/08	K		
7 - Cisco Systems		None	J	T					
8 - Europacific Growth Fd Cl A	A	Div.	J	T	bought	1/8/08	K		
9 - Exxon Mobil	B	Div.	L	T					
10 - Federal Home Loan Mtg Corp	A	Div.	J	T					
11 - General Electric	B	Div.	L	T	part sale	5/30	K	A	
12 - Hanesbrand		None	J	T	part sale	1/3/08	J	A	
13 - Hospira		None	J	T					
14 - IBM	A	Div.	J	T					
15 - Kraft Foods	B	Div.	K	T					
16 - MBIA	A	Div.	J	T					
17 - Medco Health Solutions		None	J	T					

1 Income/Gain Codes: A=\$1,000 or less (See Col. B1, D4)	B=\$1,001 - \$2,500 F=\$50,001 - \$100,000	C=\$2,501 - \$5,000 G=\$100,001 - \$1,000,000	D=\$5,001 - \$15,000 H1=\$1,000,000 - \$5,000,000	E=\$15,001 - \$50,000 H2=More than \$5,000,000
2 Value Codes: (See Col. C1, D3)	J=\$15,000 or less N=\$250,00 - \$500,000 P3=\$25,000,0001 - \$50,000,000	K=\$15,001 - \$50,000 O=\$500,001 - \$1,000,000	L=\$50,001 - \$100,000 P1=\$1,000,000 - \$5,000,000 P4=More than \$50,000,000	M=\$100,000 - \$250,000 P2=\$5,000,0001 - \$25,000,000

3 Value Method Codes: Q=Appraisal (See Col. C2)	R=Cost (real estate only) U=Block value V=Other	S=Assessment W=Estimated	T=Cash/Market
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FINANCIAL DISCLOSURE REPORT

Name of Person Reporting

Date of Report

Harvey Bartle, III

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VII. Page 1 INVESTMENTS AND TRUSTS – income, value, transactions (includes those of spouse and children. See pp. 34-57 of Instructions.)

A. Description of Assets (including trust assets) <i>Place "(X)" after each asset exempt from prior disclosure.</i>	B. Income during reporting period		C. Gross value at end of reporting period		D. Transaction during reporting period				
	(1)	(2)	(1)	(2)	(1)	If not exempt from disclosure			
	Amt. Code1 (A-I)	Type (e.g., div., rent or int.)	Value Code2 (J-P)	Value Method Code3 (Q-W)	Type (e.g. buy, sell, merger, redemption)	(2) Date: Month- Day	(3) Value Code2 (J-P)	(4) Gain Code1 (A-H)	(5) Identity of buyer/seller (if private transaction)
☐ NONE (No reportable income)									
1 - Merck & Co.	A	Div.	J	T					
2 - PNC Corp.	C	Div.	K	T					
3 - PPL Corp.	B	Div.	L	T					
4 - Philip Morris International (spin-off Altria)	B	Div.	M	T					
5 - PPG Industries	C	Div.	L	T					
6 - Sara Lee	B	Div.	K	T	part sale	1/3/08	K	A	
7 - Verizon Communications	C	Div.	L	T					
8 - Blackrock Muniyield PA Insd Fd.	B	Div.			sold	12/11	K	A	
9 - Nuveen PA Premium Inc Fd 2	B	Div.			sold	12/11	K	A	
10 - PA Insd Mun Inc Tr 1st Ser	A	Div.	J	T					
11 - Fairpoint Communications (spin-off Verizon)		None			part sale	4/1/08	J	A	
12					sold	5/30	J	A	
13 - South East PA Transit 5%	B	Ex. Int.	K	T					
14 - Lehigh Co Hosp 5%	B	Ex. Int.			redeemed	7/1/08	K	A	
15 - PA Int Govt 5%	B	Ex. Int.	K	T					
16 - Wachovia Command Money Mkt	A	Div.	L	T					
17 - Bank of Holland CD 4%	A	Int.	K	T					

1 Income/Gain Codes: A=\$1,000 or less (See Col. B1, D4)	B=\$1,001 - \$2,500 F=\$50,001 - \$100,000	C=\$2,501 - \$5,000 G=\$100,001 - \$1,000,000	D=\$5,001 - \$15,000 H1=\$1,000,000 - \$5,000,000	E=\$15,001 - \$50,000 H2=More than \$5,000,000
2 Value Codes: (See Col. C1, D3)	J=\$15,000 or less N=\$250,00 - \$500,000 P3=\$25,000,0001 - \$50,000,000	K=\$15,001 - \$50,000 O=\$500,001 - \$1,000,000	L=\$50,001 - \$100,000 P1=\$1,000,000 - \$5,000,000 P4=More than \$50,000,000	M=\$100,000 - \$250,000 P2=\$5,000,0001 - \$25,000,000
3 Value Method Codes: Q=Appraisal (See Col. C2)	R=Cost (real estate only) U=Block value	S=Assessment V=Other	T=Cash/Market W=Estimated	

FINANCIAL DISCLOSURE REPORT

Name of Person Reporting

Date of Report

Harvey Bartle, III

May-09

VII. Page 1 INVESTMENTS AND TRUSTS -- income, value, transactions (includes those of spouse and children. See pp. 34-57 of Instructions.)

A. Description of Assets (including trust assets) <i>Place "(X)" after each asset exempt from prior disclosure.</i>		B. Income during reporting period		C. Gross value at end of reporting period		D. Transaction during reporting period			
		(1)	(2)	(1)	(2)	(1)	If not exempt from disclosure		
		Amt. Code1 (A-H)	Type (e.g., div., rent or int.)	Value Code2 (J-P)	Value Method Code3 (Q-W)	Type (e.g. buy, sell, merger, redemption)	(2) Date: Month- Day	(3) Value Code2 (J-P)	(4) Gain Code1 (A-H)
☐	NONE (No reportable income)								
1	- Westsound Bank CD 3.8%	A	Int.			redeemed	12/30	K	A
2	- Doral Bank CD 4.15%	A	Int.			redeemed	6/30	J	A
3	- Discover Bank CD 4.2%	A	Int.	K	T				
4									
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10									
11									
12									
13									
14									
15									
16									
17									

1 Income/Gain Codes: A=\$1,000 or less (See Col. B1, D4)	B=\$1,001 - \$2,500 F=\$50,001 - \$100,000	C=\$2,501 - \$5,000 G=\$100,001 - \$1,000,000	D=\$5,001 - \$15,000 H1=\$1,000,000 - \$5,000,000	E=\$15,001 - \$50,000 H2=More than \$5,000,000
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3 Value Method Codes: Q=Appraisal (See Col. C2)	R=Cost (real estate only) U=Block value	S=Assessment V=Other	T=Cash/Market W=Estimated	

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Name of Person Reporting

Bartle III, Harvey

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

FINANCIAL DISCLOSURE REPORT

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Name of Person Reporting

Bartle III, Harvey

Date of Report

05/11/2009

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

NOTE: ANY INDIVIDUAL WHO KNOWINGLY AND WILFULLY FALSIFIES OR FAILS TO FILE THIS REPORT MAY BE SUBJECT TO CIVIL AND CRIMINAL SANCTIONS (5 U.S.C. app. § 104)

FILING INSTRUCTIONS

Mail signed original and 3 additional copies to:

Committee on Financial Disclosure
Administrative Office of the United States Courts
Suite 2-301
One Columbus Circle, N.E.
Washington, D.C. 20544