

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) Wolf, Mark L.	2. Court or Organization District of Massachusetts	3. Date of Report 05/11/2009
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) U.S. District Judge Active	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 1 Courthouse Way Suite 5110 Boston, MA 02210	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.)

<u>POSITION</u>	<u>NAME OF ORGANIZATION/ENTITY</u>
1. Chairman Emeritus, Director	Albert Schweitzer Fellowship
2. Chair	John William Ward Fellowship
3. Trustee	████████ Personal Residence Trust
4.	
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.	

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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	U.S. Department of State (Per Diem received in 2008 for October, 2007)	\$636.00
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.	
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. New York Patent Law Association	3/27	NY, NY	Dinner for Fed. Judiciary	(Transportation, Food, Lodging)
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 Month - Day	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	(5) Identity of buyer/seller (if private transaction)
1. Fidelity USA (Money Market)	B	Dividend	L	T					
2. Bank of America (Checking)	A	Interest	K	T					
3. Bank of America (Savings)	A	Interest	K	T					
4. Atlantic Whitehall G.F. (Mutual)	A	Dividend	J	T	Sold (part)	5/4	M		
5.					Sold (part)	5/29	M		
6. AIM Liquid Asset Money Market Fund (Money Market)	A	Interest	L	T					
7. AIM Liquid Asset Money Market Fund (Money Market)	A	Interest	K	T					
8. Atlantic Whitehall Eq. Inc. Fund (Mutual)	A	Dividend	K	T	Sold (part)	10/8	J	A	
9. Atlantic Whitehall Midcap Growth (Mutual)		None	J	T	Sold (part)	12/23	L		
10. McDonalds Corp. (Stock)	A	Dividend	K	T					
11. Foxborough MA 5.25% 11/15/09	B	Interest	K	T					
12. EMC Corp. MA (Stock)		None	J	T					
13. Atlantic Whitehall Midcap Growth (Mutual)		None	J	T	Sold (part)	10/8	K		
14.					Sold (part)	12/23	K		
15. Atlantic Whitehall Growth Fund (Mutual)	A	Dividend	J	T	Sold (part)	10/8	K		
16.					Sold (part)	12/16	K		
17. Neuberger Berman Genesis Fund (Mutual)	B	Distribution	K	T					

1. Income Gain Codes:

(See Columns B1 and D4)

2. Value Codes

(See Columns C1 and D3)

3. Value Method Codes

(See Column C2)

A = \$1,000 or less

F = \$50,001 - \$100,000

J = \$15,000 or less

N = \$250,001 - \$500,000

P3 = \$25,000,001 - \$50,000,000

Q = Appraisal

U = Book Value

B = \$1,001 - \$2,500

G = \$100,001 - \$1,000,000

K = \$15,001 - \$50,000

O = \$500,001 - \$1,000,000

R = Cost (Real Estate Only)

V = Other

C = \$2,501 - \$5,000

H1 = \$1,000,001 - \$5,000,000

L = \$50,001 - \$100,000

P1 = \$1,000,001 - \$5,000,000

P4 = More than \$50,000,000

S = Assessment

W = Estimated

D = \$5,001 - \$15,000

H2 = More than \$5,000,000

M = \$100,001 - \$250,000

P2 = \$5,000,001 - \$25,000,000

T = Cash Market

E = \$15,001 - \$50,000

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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				
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18. LILO, LLC (Limited Liability Corp.)	E	Dividend	M	W					
19. AIM Liquid Assets (Money Market)	A	Interest	J	T					
20. AIM Liquid Assets (Money Market)	A	Interest	J	T					
21. AIM Liquid Assets (Money Market)	A	Interest	J	T					
22. Citizens Bank (Savings and Checking)	A	Interest	K	W					
23. Mass State Cons. MBIASERD 5.5% (Bond) 11/1/12	C	Interest	L	T					
24. Boston MA G.O. 5% 8/1/13 (Bond)	B	Interest	K	T					
25. Longleaf Partners (Mutual Fund)		None			Sold (part)	10/8	K		
26.					Sold (part)	4/8	K		
27.					Sold (part)	9/2	K		
28. Longleaf Partners (Mutual Fund)		None			Sold (part)	10/8	K		
29.					Sold (part)	5/15	K		
30.					Sold (part)	5/22	K		
31. Dodge & Cox Stock Fund (Mutual Fund)	D	Distribution			Sold (part)	5/15	K		
32.					Sold (part)	10/8	K		
33. Brookline MA GO 5.125% (Bond)	B	Interest	K	T					
34. AIM Liquid Asset MM Fund (Money Mark et)	A	Interest			Sold	1/28	J		

1. Income Gain Codes:

(See Columns B1 and D4)

2. Value Codes

(See Columns C1 and D3)

3. Value Method Codes

(See Column C2)

A = \$1,000 or less

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N = \$250,001 - \$500,000

P3 = \$25,000,001 - \$50,000,000

Q = Appraisal

U = Book Value

B = \$1,001 - \$2,500

G = \$100,001 - \$1,000,000

K = \$15,001 - \$50,000

O = \$500,001 - \$1,000,000

R = Cost (Real Estate Only)

V = Other

C = \$2,501 - \$5,000

H1 = \$1,000,001 - \$5,000,000

L = \$50,001 - \$100,000

P1 = \$1,000,001 - \$5,000,000

P4 = More than \$50,000,000

S = Assessment

W = Estimated

D = \$5,001 - \$15,000

H2 = More than \$5,000,000

M = \$100,001 - \$250,000

P2 = \$5,000,001 - \$25,000,000

T = Cash Market

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35. Shrewsbury MA Bond	A	Interest			Matured	8/15	J		
36. MA Wtr Poll ABTMT 5.15% 8/1/09 (Bond)	C	Interest	L	T					
37. MBTA Sales Tax 5.25% 7/1/11 (Bond)	C	Interest	L	T					
38. MA Wtr Res Auth 5.25% 8/1/11 (Bond)	B	Interest	L	T					
39. Norwell MA FGIC 5% 11/15/15 (Bond)	B	Interest	K	T					
40. Dodge & Cox International Stock Fund (Mutual)	A	Distribution	J	T	Sold (part)	10/8	J		
41.						12/12	J		
42. First Eagle Overseas Fund (Mutual)		None			Sold	4/8	K		
43. Templeton Emerging Markets Fund (Mutual)		None			Sold	4/8	J		
44. Aim Liquid Assets MM Fund (Money Market)	A	Interest	J	T					
45. Dodge & Cox International Stock Fund (Mutual)	B	Distribution	J	T					
46. First Eagle Overseas Fund (Mutual)		None			Sold	4/8	K		
47. Templeton Emerging Markets Fund (Mutual)		None			Sold	4/8	J		
48. Aim Liquid Assets MM Fund (Money Market)	A	Interest	J	T					
49. Dodge & Cox International Stock Fund (Mutual)	B	Distribution	J	T	Sold (part)	10/24	J		
50. First Eagle Overseas Fund (Mutual)		None			Sold	4/8	K		
51. Templeton Emerging Markets Fund (Mutual)		None			Sold	4/8	K		

1. Income Gain Codes:

(See Columns B1 and D4)

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3. Value Method Codes

(See Column C2)

Q = Appraisal

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B = \$1,001 - \$2,500

G = \$100,001 - \$1,000,000

K = \$15,001 - \$50,000

O = \$500,001 - \$1,000,000

R = Cost (Real Estate Only)

V = Other

C = \$2,501 - \$5,000

H1 = \$1,000,001 - \$5,000,000

L = \$50,001 - \$100,000

P1 = \$1,000,001 - \$5,000,000

P4 = More than \$50,000,000

S = Assessment

W = Estimated

D = \$5,001 - \$15,000

H2 = More than \$5,000,000

M = \$100,001 - \$250,000

P2 = \$5,000,001 - \$25,000,000

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52. Atlantic Whitehall Equity Income (mutual)	B	Dividend	L	T					
53. Mangers Time Sq. Midcap growth (mutual)	A	Distribution	K	T					
54. Atlantic Whitehall Equity Income (mutual)	A	Dividend	K	T					
55. Managers Time Sq. Midcap growth (mutual)	A	Distribution	J	T					
56. Lazard Emerging Market Fund (Mut)	A	Distribution	J	T	Buy	4/6	J		
57.					Sold (part)	12/3	J		
58. American Century Intl Disc Fund (Mut)		None	J	T	Buy	4/8	K		
59.					Sold (part)	11/24	J		
60. Lazard Energy Markets (mutual)	A	Distribution	J	T	Buy	4/8	K		
61.					Sold (part)	10/24	J		
62. American Century Intl Disc Fund (Mut)		None	J	T	Buy	4/8	K		
63.					Sold (part)	10/24	J		
64. Ishare Russell 1000 Growth Fund Exchange Traded Fund (ETF)	A	Dividend	K	T	Buy	10/8	K		
65.					Buy (add'l)	12/22	K		
66. Ishare Russell 1000 Value Fund (ETF)	A	Dividend	K	T	Buy	10/8	K		
67. Ishare Russell Midcap Growth Fund (ETF)	A	Dividend	J	T	Buy	10/8	K		
68.					Buy (add'l)	12/23	K		

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(See Columns B1 and D4)

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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

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O = \$500,001 - \$1,000,000

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(See Column C2)

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69. Lazard Emerging Markets (Mut)	A	Distribution	J	T	Buy	4/8	J		
70.					Sold (part)	12/3	J		
71. American Century Intl Disc (Mut)		None	J	T	Buy	4/8	K		
72.					Sold (part)	11/24	J		
73. Ishare Russell MSCI EAFE inded fund (ET F)	A	Dividend	J	T	Buy	11/24	J		
74.					Buy (add'l)	12/3	J		
75.					Buy (add'l)	12/12	J		
76. Ishare Russell 1000 Value (ETF)	A	Dividend	M	T	Buy	10/8	M		
77.					Buy (add'l)	12/16	M		
78. Ishare Russell 1000 Value (ETF)	A	Dividend	J	T	Buy	10/8	J		
79. Ishare Russell Midcap Growth (ETF)	A	Dividend	K	T	Buy	10/8	K		
80.					Buy (add'l)	12/23	K		
81. Ma St. Sales Tax 5% 8/15/17		None	K	T	Buy	8/14	K		

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(See Columns B1 and D4)

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2. Value Codes

(See Columns C1 and D3)

J = \$15,000 or less

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3. Value Method Codes

(See Column C2)

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

As previously reported, many of the assets owned by [REDACTED] me in 2008 were held and managed by an investment advisory firm, Atlantic Trust Pell Rudman ("ATPR"). ATPR has provided the information contained in this report concerning assets in its custody. The information provided by ATPR is, to the best of my knowledge, accurate.

I have not listed in Part VII the asset of [REDACTED] Personal Residence Trust reported in Part I because I have no beneficial interest in it and do not at this time control the purchase, sale, or other disposition of the asset.

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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

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