

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2019

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) Beetlestone, Wendy	2. Court or Organization U.S. DISTRICT COURT - EDPA	3. Date of Report 07/16/2020
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	6. Reporting Period 01/01/2019 to 12/31/2019
	5b. ☐ Amended Report	
7. Chambers or Office Address JAMES A. BYRNE U.S. COURTHOUSE 601 MARKET STREET PHILADELPHIA, PA 19106		
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 Professor	University of Pennsylvania Law School
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.	
2.	
3.	

FINANCIAL DISCLOSURE REPORT

Page 2 of 12

Name of Person Reporting

Beetlestone, Wendy

Date of Report

07/16/2020

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. 2019	University of Pennsylvania Law School (teaching stipend)	\$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. 2019	THE TRUSTEES OF THE UNIVERSITY OF PENNSYLVANIA - 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.				

Name of Person Reporting	Date of Report
Beetlestone, Wendy	07/16/2020

V. GIFTS. (Includes those to spouse and dependent children; see pp. 28-31 of filing instructions.)

☒ NONE (No reportable gifts.)

SOURCE	DESCRIPTION	VALUE
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.)

CREDITOR	DESCRIPTION	VALUE CODE
1. Capital One Visa	Credit Card	J
2.		
3.		
4.		
5.		

FINANCIAL DISCLOSURE REPORT

Page 4 of 12

Name of Person Reporting

Beetlestone, Wendy

Date of Report

07/16/2020

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)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
	Amount Code 1 (A-H)	Type (e g , div , rent, or int)	Value Code 2 (J-P)	Value Method Code 3 (Q-W)	Type (e g , buy, sell, redemption)	Date mm/dd/yy	Value Code 2 (J-P)	Gain Code 1 (A-H)	Identity of buyer/seller (if private transaction)

1. Individual Assets (H)									
2. Wells Fargo (cash)	A	Interest	L	T					
3. PNC Bank (cash)	B	Interest	M	T					
4. Brokerage Account #1 (H)									
5. TD Ameritrade Deposit Account IDA12 (MMDA12) (cash)	A	Interest	M	T					
6. College Station Tex Indpt Sc G O Sch Bldg Bds Call Pre-Ref (194475NT2)	C	Interest			Sold	08/15/19	M		
7. Denton Tex For Issues Dtd Pri Go Ref and Impt Bds (248866P25)	A	Interest	L	T	Buy	04/24/19	L		
8. Fox Valley Tech College Dist Go Prom NTS (351594QD1)	C	Interest			Sold	12/02/19	M		
9. Grapevine-Colleyville Indpt Sc Ultd Tax Sch Bds (3886403H5)	C	Interest	M	T					
10. Grapevine-Colleyville Indpt SC Ultd Tax Sch Bldg Bds 5% (3886404C5)	B	Interest	L	T	Buy	04/25/19	L		
11. Hawaii St Go Bds Call Pre-Ref (419792KV7)	C	Interest	L	T					
12. Hawaii St Go Bds (419792ME3)	C	Interest	M	T					
13. JEA FLA Elec Sys Rev Rev Bds Call Pre-Ref (46613SGT1)	C	Interest	M	T					
14. King Cnty Wash Sch Dist No 405 Ultd Tax Go And Ref Bds (495098YQ2)	C	Interest	L	T					
15. King Cnty Wash Sch Dist 411 Ultd Tax Go Ref Bds 5% (4952242D8)	B	Interest	L	T	Buy	02/14/19	L		
16. Montgomery Cnty PA Go Bds (6135794U2)	C	Interest	L	T					
17. New York NY Go Bds (64966MST7)	C	Interest	M	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 5 of 12

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18. Ohio State Go Ref Bds (677521EQ5)	C	Interest	L	T					
19. Putnam County Tenn Go Sch Ref Bds 5% (746673YJ5)	B	Interest	L	T	Buy	04/24/19	L		
20. Sheldon Te Indpt Sch Dist Ultd Tax Sch Bldg Ref B (8225165J5)	C	Interest	M	T					
21. State BK India Chicago ILL Cd 2.05% (856283L87)		None	M	T	Buy	12/11/19	M		
22. Texas St Go Bds (882724AX5)	D	Interest	M	T					
23. Trinity River Auth Tex Regl Rev Bds (89658HUA6)	C	Interest	M	T					
24. University Tex Univ Revs Rev Bds (9151377Q0)	C	Interest	M	T					
25. Wisconsin St Clean Wtr Rev Bds (977092WA9)	B	Interest	K	T	Buy	02/14/19	K		
26. Wylie Tex Indpt Sch Dist Ultd Tax Ref Bds 4% (983068F77)	A	Interest	L	T	Buy	04/24/19	L		
27. DFA Intl Social Core Equity Port (DSCLX)	D	Dividend	N	T	Buy	05/23/19	N		
28. DFA US Social Core Equity 2 (DFUEX)	E	Dividend	O	T	Buy	05/23/19	N		
29. DFA Intl Real Estate Sec PTF (DFITX)	C	Dividend	K	T	Sold (part)	07/10/19	J		
30. DFA Emerging Markets Social Core PTF (DFESX)	B	Dividend	L	T	Buy	05/23/19	L		
31. DFA Tax Mgd US Sm Cap Fd (DFTSX)	A	Dividend			Sold	05/23/19	M		
32. DFA Tax Mgd US Targeted Val (DTMVX)	E	Dividend	N	T	Sold (part)	05/23/19	N		
33. DFA Five-Year Global Fixed PTF (DFGBX)	B	Dividend	M	T	Buy	08/20/19	M		
34. DFA Emerging Markets Core Equity I (DFCEX)	A	Dividend			Sold	05/23/19	L		

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FINANCIAL DISCLOSURE REPORT

Page 6 of 12

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Beetlestone, Wendy

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35. DFA Tax Mgd Intl Value Fd (DTMIX)	A	Dividend			Sold	05/23/19	M		
36. DFA Emerging Mkts Value PTF (DFEVX)	A	Dividend			Sold	05/23/19	K		
37. DFA Intl Sm Cap Val Port (DISVX)		None			Sold	05/23/19	M		
38. American Water Works Co Inc New (AWK)	A	Dividend	K	T					
39. Aqua America Inc (WTR)	A	Dividend	K	T					
40. BP PLC Spon ADR (BP)	D	Dividend	L	T					
41. California Water SVC Group (CWT)	A	Dividend	L	T					
42. Chevron Corp New (CVX)	B	Dividend			Sold	04/10/19	M		
43. Exxon Mobil Corp (XOM)	D	Dividend	M	T					
44. Marathon Pete Corp (MPC)	D	Dividend	M	T					
45. Middlesex Water Co (MSEX)	A	Dividend	K	T					
46. Phillips 66 (PSX)	C	Dividend	L	T	Sold (part)	12/09/19	L		
47. Royal Dutch Shell PLC Spon ADR A (RDS.A)	E	Dividend	M	T					
48. IRA #1 (H)									
49. DFA Intl Real Estate Sec PTF (DFITX)	D	Dividend	L	T					
50. DFA Real Estate PT (DFREX)	B	Dividend	L	T	Sold (part)	12/10/19	J		
51. TRUST #1 (H)									

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	(1)	(2)	(1)	(2)	(1)	(2)	(3)	(4)	(5)
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52. TD Ameritrade Deposit Account IDA12 (MMDA12) (cash)	A	Interest	K	T					
53. DFA Emerging Markets Core Equity I (DFCEX)	B	Dividend	L	T					
54. DFA Real Estate PT (DFREX)	B	Dividend	L	T					
55. DFA International Value I (DFIVX)	A	Dividend	K	T					
56. DFA US Large Co Portfolio (DFUSX)	A	Dividend	K	T	Buy	05/03/19	K		
57. Amazon Com Inc (AMZN)		None	M	T					
58. American Express Co (AXP)	A	Dividend	J	T					
59. AT&T (T)	A	Dividend	J	T					
60. Caterpillar Inc Del (CAT)	A	Dividend	J	T					
61. Coca Cola Co (KO)	A	Dividend	J	T					
62. Comcast Corp New Cl A SPL (CMCSA)	A	Dividend	J	T					
63. Corteva Inc (CTVA) (X)	A	Dividend	J	T					
64. Dow Inc (DOW) (X)	A	Dividend	J	T					
65. Dupont De Nemours (DD) (X)	A	Dividend	J	T					
66. DowDuPont (DWDP) (Y)									
67. EBAY Inc (EBAY)	A	Dividend	J	T					
68. Emerson Elec Co (EMR)	A	Dividend	J	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

FINANCIAL DISCLOSURE REPORT

Page 8 of 12

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Beetlestone, Wendy

Date of Report

07/16/2020

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69. Expedia Inc Del Com New (EXPE)	A	Dividend	J	T					
70. Exxon Mobil Corp (XOM)	B	Dividend	K	T					
71. Fox Corp Cl B (FOX)	A	Dividend	J	T					
72. Intel Corp (INTC)	A	Dividend	K	T					
73. JP Morgan Chase & Co Com (JPM)	A	Dividend	J	T					
74. Kimberly Clark Corp (KMB)	A	Dividend	J	T					
75. Kraft Foods Group Inc (KHC)	A	Dividend	J	T					
76. Liberty Media SiriusXM C (LSXMK)		None	J	T					
77. Microsoft Inc (MSFT)	A	Dividend	K	T					
78. Mondelez Intl Inc Cl A (MDLZ)	A	Dividend	J	T					
79. Occidental Pete Corp Del (OXY)	A	Dividend	J	T					
80. Paypal Holdings Inc (PYPL)		None	J	T					
81. Pepsico Inc (PEP)	A	Dividend	J	T					
82. Procter & Gamble Co (PG)	A	Dividend	J	T					
83. Raytheon Co Com New (RTN)	A	Dividend	K	T					
84. Rio Tinto PLC Spon ADR (RIO)	D	Dividend	L	T					
85. Royal Dutch Shell PLC Spon ADR A (RDSA)	B	Dividend	K	T					

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FINANCIAL DISCLOSURE REPORT

Page 9 of 12

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86. Southern Copper Corp (SCCO)	A	Dividend	J	T					
87. Taiwan Semiconductor MF LTD Spon ADR (TSM)	A	Dividend	J	T					
88. Texas Instrs Inc (TXN)	A	Dividend	K	T					
89. Total SA Sponsored ADR (TOT)	B	Dividend	K	T					
90. Twenty First Century Fox Inc (TFCF)		None			Spinoff (from line 71)	03/19/19	J		
91.					Merged (with line 93)	03/21/19	J		
92. Wal Mart Stores Inc (WMT)	A	Dividend	J	T					
93. Disney Walt Co Com Disney (DIS)	A	Dividend	K	T					
94. 403(b) #1 (H)									
95. Vanguard Small-Cap Value Index (VISVX) (X)		None	N	T					
96. Vanguard Value Index Fund Inv (VIVAX) (X)		None	M	T					
97. Vanguard Total Intl Stock Index Inv (VGTSX) (X)		None	M	T					
98. Vanguard Real Estate Index Investor (VGSIX) (X)		None	L	T					
99. Vanguard Inter-Term Bond Index Inv (VBIIX) (X)		None	N	T					
100. Vanguard International Value Fund (VTRIX) (X)		None	M	T					
101. Vanguard Small - Cap Index Fund Inv (NAESX) (X)		None	M	T					
102. Vanguard Total Bond Market Index Inst (VBTIX) (X)		None	N	T					

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103. Vanguard Emerging Markets Stock Index Inst (VEMIX) (X)		None	K	T					
104. Vanguard Total Stock Market Index Inst Plus (VSMPX) (X)		None	M	T					
105. Vanguard Wellington Fund Inv (Y)									
106. Vanguard Primecap Fund Admiral (Y)									
107. Vanguard Target Retirement 2025 (Y)									
108. 403(b) #2 (H)									
109. T-C Lifecycle Index 2025-Inst (M04350I-1) (X)	A	Dividend	J	T					
110. CREF Stock R3		None	O	T					
111. CREF Global Equities R3		None	J	T					
112. T-C Intl Eq Rtmt	B	Dividend	M	T					
113. TIAA Real Estate	A	Interest	J	T					
114. TIAA Traditional	B	Interest	M	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

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Q =Appraisal

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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

FINANCIAL DISCLOSURE REPORT

Page 11 of 12

Name of Person Reporting	Date of Report
Beetlestone, Wendy	07/16/2020

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

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value, per page 42 of the filing instructions.

FINANCIAL DISCLOSURE REPORT

Page 12 of 12

Name of Person Reporting

Beetlestone, Wendy

Date of Report

07/16/2020

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/ Wendy Beetlestone**

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
Suite 2-301
One Columbus Circle, N.E.
Washington, D.C. 20544