

**FINANCIAL DISCLOSURE REPORT
FOR CALENDAR YEAR 2018**

*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 08/03/2019
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 01/01/2018 to 12/31/2018
	5b. ☐ Amended Report	
7. Chambers or Office Address JAMES A. BYRNE U.S. COURTHOUSE 601 MARKET STREET PHILADELPHIA, PA 19106		
IMPORTANT NOTES: <i>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>		

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 18

Name of Person Reporting

BEETLESTONE, WENDY

Date of Report

08/03/2019

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. 2018	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. 2018	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. Cayman Law School	February 7-9, 2018	Georgetown, Cayman Islands	Lecture to faculty and students	Transportation and lodging
2.				
3.				
4.				
5.				

Name of Person Reporting	Date of Report
BEETLESTONE, WENDY	08/03/2019

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 18

Name of Person Reporting

BEETLESTONE, WENDY

Date of Report

08/03/2019

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. WELLS FARGO (CASH)	A	Interest	J	T					
2. PNC BANK (CASH)	A	Interest	L	T					
3. BROKERAGE ACCOUNT #1 (H)									
4. DEPOSIT ACCOUNT IDA12 (MMDA12) (cash)	A	Interest	M	T					
5. COLLEGE STATION TEX INDPT SC G O SCH BLDG BDS CALL PRE-REF (194475NT2)	C	Interest	M	T	Buy	02/08/18	M		
6. FOX VALLEY TECH COLLEGE DIST GO PROM NTS (351594QD1)	C	Interest	M	T	Buy	02/08/18	M		
7. GRAPEVINE-COLLEYVILLE INDPT SC ULTD TAX SCH BDS (3886403H5)	C	Interest	M	T	Buy	02/08/18	M		
8. HAWAII ST GO BDS CALL PRE-REF (419792KV7)	C	Interest	L	T	Buy	02/08/18	L		
9. HAWAII ST GO BDS (419792ME3)	C	Interest	M	T	Buy	02/08/18	M		
10. JEA FLA ELEC SYS REV REV BDS CALL PRE-REF (46613SGT1)	C	Interest	M	T	Buy	02/08/18	M		
11. KING CNTY WASH SCH DIST NO 405 ULTD TAX GO AND REF BDS (495098YQ2)	C	Interest	L	T	Buy	02/08/18	L		
12. MONTGOMERY CNTY PA GO BDS (6135794U2)	B	Interest	L	T	Buy	02/08/18	M		
13. NEW YORK NY GO BDS (64966MST7)	B	Interest	M	T	Buy	02/08/18	M		
14. OHIO STATE GO REF BDS (677521EQ5)	C	Interest	L	T	Buy	02/08/18	L		
15. SHELTON TEX INDPT SCH DIST ULTD TAX SCH BLDG REF B (8225165J5)	B	Interest	L	T	Buy	02/08/18	L		
16. TEXAS ST GO BDS (882724AX5)	C	Interest	M	T	Buy	02/08/18	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 \$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 18

Name of Person Reporting

BEETLESTONE, WENDY

Date of Report

08/03/2019

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)
17. TRINITY RIVER AUTH TEX REGL REV BDS (89658HUA6)	B	Interest	M	T	Buy	02/08/18	M		
18. UNIVERSITY TEX UNIV REVS REV BDS (9151377Q0)	C	Interest	M	T	Buy	02/08/18	M		
19. DFA TAX MGD US SM CAP FD (DFTSX)	B	Dividend	M	T	Buy	01/31/18	M		
20.					Sold	11/15/18	M		
21.					Buy	12/20/18	M		
22. DFA TAX MGD US TARGETED VAL (DTMVX)	D	Dividend	O	T	Buy	01/31/18	O		
23.					Sold	11/15/18	O		
24.					Buy	12/20/18	O		
25. DFA INTL REAL ESTATE SEC PTF (DFITX)	B	Dividend	K	T	Buy	01/31/18	K		
26. DFA EMERGING MARKETS CORE EQUITY I (DFCEX)	A	Dividend	L	T	Buy	11/15/18	L		
27. DFA TAX MGD INTL VALUE FD (DTMIX)		None	M	T	Buy	12/20/18	M		
28. DFA EMERGING MKTS VALUE PTF (DFEVX)	A	Dividend	K	T	Buy	01/31/18	L		
29. DFA US TARGETED VAL (DFFVX)	E	Dividend			Buy	11/15/18	O		
30.					Sold	12/20/18	O		
31. DFA INTL SML PTFL (DFISX)	D	Dividend			Buy	01/31/18	M		
32.					Sold	11/15/18	M		
33.					Buy	11/15/18	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 \$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 6 of 18

Name of Person Reporting

BEETLESTONE, WENDY

Date of Report

08/03/2019

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)
34.					Sold	12/20/18	M		
35. DFA US SMALL CAP I (DFSTX)	D	Dividend			Buy	11/15/18	M		
36.					Sold	12/20/18	M		
37. DFA INT SMALL CAP GROWTH PORTFOLIO (DISMX)	D	Dividend			Buy	11/15/18	M		
38.					Sold	12/20/18	M		
39. DFA INTL SM CAP VAL PORT (DISVX)	A	Dividend	M	T	Buy	01/31/18	L		
40.					Sold	11/15/18	L		
41.					Buy	12/20/18	M		
42. ISHARES MSCI STH KOR ETF (EWY)		None			Sold	01/30/18	J		
43. I SHARES MSCI STH AFR ETF (EZA)		None			Sold	01/30/18	J		
44. AKZO NOBEL NV SPON ADR (AKZOY)		None			Sold	01/30/18	K		
45. ALLIANCE RES PART LP UT LTD PART SBI/CBI (ARLP)		None			Sold	01/30/18	K		
46. AMERICA MOVIL SAB DE CV SPON ADR L SHS (MAK)		None			Sold	01/30/18	K		
47. AMERICAN WATER WORKS CO INC NEW (AWK)	A	Dividend	K	T					
48. ANADARKO PETE CORP (APC)		None			Sold	01/30/18	K		
49. AQUA AMERICA INC (WTR)	A	Dividend	K	T					
50. BOEING CO (BA)		None			Sold	01/30/18	L		

1 Income Gain Codes: (See Columns B1 and D4)	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	B =\$1,001 - \$2,500 G =\$100,001 - \$1,000,000 K =\$15,001 - \$50,000 O =\$500,001 - \$1,000,000	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	D =\$5,001 - \$15,000 H2 =More than \$5,000,000 M =\$100,001 - \$250,000 P2 =\$5,000,001 - \$25,000,000	E =\$15,001 - \$50,000
2 Value Codes (See Columns C1 and D3)	Q =Appraisal U =Book Value	R =Cost (Real Estate Only) V =Other	S =Assessment W =Estimated	T =Cash Market	
3 Value Method Codes (See Column C2)					

FINANCIAL DISCLOSURE REPORT

Page 7 of 18

Name of Person Reporting

BEETLESTONE, WENDY

Date of Report

08/03/2019

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)

51. BP PLC SPON ADR (BP)	D	Dividend	L	T					
52. BUCKEYE PART LP UNIT LTD PART SBI/CBI (BPL)		None			Sold	01/30/18	K		
53. CALIFORNIA RESOURCES CORP (CRC)		None			Sold	01/30/18	J		
54. CALIFORNIA WATER SVC GROUP (CWT)	A	Dividend	L	T					
55. CARRIZO OIL & GAS INC (CRZO)		None			Sold	01/30/18	J		
56. CHEVRON CORP NEW (CVX)	D	Dividend	M	T					
57. CNOOC LTD SPON ADR (CEO)		None			Sold	01/30/18	L		
58. CHINA PETE & CHEM CORP SPON ADR H SHS (SNP)		None			Sold	01/30/18	K		
59. CONOCO PHILLIPS (COP)		None			Sold	01/30/18	M		
60. DCP MIDSTREAM PART LP COM (DPM)		None			Sold	01/30/18	K		
61. DOWDUPONT (DWDP)		None			Sold	01/30/18	K		
62. ENBRIDGE ENERGY PART LP (EEP)		None			Sold	01/30/18	J		
63. ENBRIDGE INC (ENB)		None			Sold	01/30/18	J		
64. ENERGY TRANSFER EQUITY LP COM (ETE)		None			Sold	01/30/18	K		
65. ENERGY TRANSFER PART LP (ETP)		None			Sold	01/30/18	K		
66. ENI SPA SPON ADR (E)		None			Sold	01/30/18	M		
67. ENTERPRISE PRODS PART LP (EPD)		None			Sold	01/30/18	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 \$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 8 of 18

Name of Person Reporting

BEETLESTONE, WENDY

Date of Report

08/03/2019

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)
68. EXXON MOBIL CORP (XOM)	D	Dividend	M	T					
69. GENERAL ELECTRIC CO (GE)	A	Dividend			Sold	01/30/18	K		
70. GENESIS ENERGY LP (GEL)	A	Distribution			Sold	01/30/18	J		
71. GOLDMAN SACHS GROUP INC (GS)		None			Sold	01/30/18	L		
72. HESS CORP (HES)		None			Sold	01/30/18	L		
73. HOLLY ENERGY PART LP (HEP)		None			Sold	01/30/18	J		
74. HUSKY ENERGY INC (HUSKF)		None			Sold	01/30/18	J		
75. INDIA FD INC (IFN)	C	Dividend			Sold	01/30/18	K		
76. INTEL CORP (INTC)		None			Sold	01/30/18	L		
77. JP MORGAN CHASE & CO COM (JPM)	A	Dividend			Sold	01/30/18	L		
78. KINDER MORGAN INC DEL (KMI)	A	Dividend			Sold	01/30/18	K		
79. KONINKLIJKE PHILIPS NV NY REG SH NEW (PHG)		None			Sold	01/30/18	J		
80. MAGELLAN MIDSTREAM PART LP (MMP)		None			Sold	01/30/18	L		
81. MARATHON OIL CORP (MRO)		None			Sold	01/30/18	L		
82. MARATHON PETE CORP (MPC)	D	Dividend	M	T					
83. MIDDLESEX WATER CO (MSEX)	A	Dividend	J	T					
84. MPLX LP COM (MPLX)		None			Sold	01/30/18	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 W =Estimated	T =Cash Market	

FINANCIAL DISCLOSURE REPORT

Page 9 of 18

Name of Person Reporting

BEETLESTONE, WENDY

Date of Report

08/03/2019

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)
85. NATIONAL GRID PLC SPON ADR NEW (NGG)	A	Dividend			Sold	01/30/18	K		
86. NATIONAL OILWELL VARCO INC (NOV)		None			Sold	01/30/18	J		
87. NORTHROP GRUMMAN CORP (NOC)		None			Sold	01/30/18	M		
88. NUCOR CORP (NUE)	A	Dividend			Sold	01/30/18	J		
89. NUSTAR ENERGY LP (NS)		None			Sold	01/30/18	J		
90. OCCIDENTAL PETE CORP DEL (OXY)	B	Dividend			Sold	01/30/18	M		
91. OCEANEERING INTL INC (OII)		None			Sold	01/30/18	J		
92. OJSC OC ROSNEFT SPON GDR REG S (OJSCY)		None			Sold	01/30/18	K		
93. OMV AG SPON ADR NEW (OMUKY)		None			Sold	01/30/18	K		
94. ONEOK (OKE)	B	Distribution			Sold	01/30/18	L		
95. PETROCHINA CO LTD SPON ADR (PTR)		None			Sold	01/30/18	K		
96. PHILLIPS 66 (PSX)	C	Dividend	M	T					
97. PIONEER NAT RES CO (PXD)		None			Sold	01/30/18	M		
98. PJSC LUKOIL SPON ADR (LUKOY)	A	Dividend			Sold	01/30/18	K		
99. PLAINS ALL AMERICAN PIPELINE LP (PAA)	A	Distribution			Sold	01/30/18	K		
100. QUALCOMM INC (QCOM)		None			Sold	01/30/18	J		
101. RIO TINTO PLC SPON ADR (RIO)		None			Sold	01/30/18	L		

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 10 of 18

Name of Person Reporting

BEETLESTONE, WENDY

Date of Report

08/03/2019

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)
102. ROYAL DUTCH SHELL PLC SPON ADR B (RDSB)		None			Sold	01/30/18	K		
103. ROYAL DUTCH SHELL PLC SPON ADR A (RDSA)	E	Dividend	M	T					
104. SASOL-LTD SPON ADR (SSL)		None			Sold	01/30/18	M		
105. SCHLUMBERGER LTD (SLB)	A	Dividend			Sold	01/30/18	M		
106. SIEMENS AG SPON ADR (SIEGY)		None			Sold	01/30/18	K		
107. SINOPEC SHANGHAI PETROCHEMICAL SPON ADR H (SHI)		None			Sold	01/30/18	K		
108. SOUTHERN COPPER CORP (SCCO)		None			Sold	01/30/18	L		
109. SPECTRA ENERGY PART LP (SEP)		None			Sold	01/30/18	J		
110. TARGA RESOURCES PART LP (TRGP)		None			Sold	01/30/18	K		
111. TATA MTRS LTD SPON ADR (TTM)		None			Sold	01/30/18	J		
112. TC PIPELINE LP (TCP)		None			Sold	01/30/18	J		
113. TEMPLETON EMER MKTS INCOME FUND (TEI)		None			Sold	01/30/18	J		
114. TEXAS INSTRUMENTS INC (TXN)	A	Dividend			Sold	01/30/18	K		
115. TOTAL SA SPON ADR (TOT)	A	Dividend			Sold	01/30/18	K		
116. TRANSCANADA CORP (TRP)	A	Dividend			Sold	01/30/18	K		
117. TRANSMONTAIGNE PART LP (TLP)		None			Sold	01/30/18	K		
118. VERIZON COMM INC (VZ)	A	Dividend			Sold	01/30/18	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 11 of 18

Name of Person Reporting

BEETLESTONE, WENDY

Date of Report

08/03/2019

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)
119. WESTERN DIGITAL CORP (WDC)	A	Dividend			Sold	01/30/18	J		
120. WOODSIDE PETE LTD (WPL)		None			Sold	01/30/18	J		
121. IRA #1 (H)									
122. FIRST EAGLE GLOBAL FD A (SGENX)		None			Sold	01/26/18	M		
123. DFA INTL REAL ESTATE SEC PTF (DFITX)	C	Dividend	L	T	Buy	01/31/18	L		
124. DFA REAL ESTATE PT (DFREX)	C	Dividend	L	T	Buy	01/31/18	L		
125.					Sold (part)	11/13/18	J		
126. TRUST #1 (H)									
127. DEPOSIT ACCOUNT IDA12 (MMDA12) (cash)	A	Interest	L	T					
128. DFA TAX MGD INTL VALUE FD (DTMIX)	A	Dividend			Buy	01/31/18	K		
129.					Sold	11/15/18	K		
130. DFA EMERGING MKTS VALUE PTF (DFEVX)	A	Dividend			Buy	01/31/18	L		
131.					Sold	11/15/18	K		
132. DFA EMERGING MARKETS CORE EQUITY I (DFCEX)	A	Dividend	L	T	Buy	11/15/18	L		
133. DFA REAL ESTATE PT (DFREX)	B	Dividend	K	T	Buy	01/31/18	K		
134. DFA INTERNATIONAL VALUE I (DFIVX)	A	Dividend	K	T	Buy	11/15/18	K		
135. AT&T (T)	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 18

Name of Person Reporting

BEETLESTONE, WENDY

Date of Report

08/03/2019

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)
136. AMAZON COM INC (AMZN)		None	L	T					
137. AMERICAN EXPRESS CO (AXP)	A	Dividend	J	T					
138. CA INC (CA)	A	Dividend			Sold	11/05/18	K		
139. CATERPILLAR INC DEL (CAT)	A	Dividend	J	T					
140. CHEMOURS (CC)		None			Sold	01/30/18	J		
141. CHUBB CORP (CB)	A	Dividend			Sold	01/30/18	J		
142. COCA COLA CO (KO)	A	Dividend	J	T					
143. COMCAST CORP NEW CI A SPL (CMCSA)	A	Dividend	J	T					
144. DISNEY WALT CO COM DISNEY (DIS)	A	Dividend	K	T					
145. DISCOVERY COMM NEW COM SER C (DISCK)		None			Sold	01/30/18	J		
146. DOWDUPONT (DWDP)	A	Dividend	J	T					
147. ENI SPA SPON ADR (E)		None			Sold	01/30/18	J		
148. EBAY INC (EBAY)		None	J	T					
149. EMERSON ELEC CO (EMR)	A	Dividend	J	T					
150. EXPEDIA INC DEL COM NEW (EXPE)	A	Dividend	J	T					
151. EXXON MOBIL CORP (XOM)	B	Dividend	K	T					
152. GAZPROM SPON ADR EA REP 2 ORD SHS (OGZPY)		None			Sold	01/30/18	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 13 of 18

Name of Person Reporting

BEETLESTONE, WENDY

Date of Report

08/03/2019

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)
153. GENERAL ELECTRIC CO (GE)	A	Dividend			Sold	01/30/18	J		
154. HESS CORP (HES)		None			Sold	01/30/18	J		
155. IMPERIAL OIL LTD COM NEW (IMO)	A	Dividend			Sold	01/30/18	J		
156. INTEL CORP (INTC)	A	Dividend	K	T					
157. JP MORGAN CHASE & CO COM (JPM)	A	Dividend	J	T					
158. KIMBERLY CLARK CORP (KMB)	A	Dividend	J	T					
159. KRAFT FOODS GROUP INC (KHC)	A	Dividend	J	T					
160. LIBERTY BROADBAND CORP C (LBRDK)		None			Sold	01/30/18	J		
161. LIBERTY MEDIA SIRIUSXM A (LSXMA)		None			Sold	01/30/18	J		
162. LIBERTY MEDIA SIRIUSXM C (LSXMK)		None	J	T					
163. MICROSOFT CORP (MSFT)	A	Dividend	K	T					
164. MONDELEZ INTL INC CL A (MDLZ)	A	Dividend	J	T					
165. OCCIDENTAL PETE CORP DEL (OXY)	A	Dividend	K	T					
166. PAYPAL HOLDINGS INC (PYPL)		None	J	T					
167. PEPSICO INC (PEP)	A	Dividend	J	T					
168. PROCTER & GAMBLE CO (PG)	A	Dividend	J	T					
169. RAYTHEON CO COM NEW (RTN)	A	Dividend	K	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 14 of 18

Name of Person Reporting

BEETLESTONE, WENDY

Date of Report

08/03/2019

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)
170. REPSOL SA SPON ADR (REPY)	A	Dividend			Sold	01/30/18	J		
171. RIO TINTO PLC SPON ADR (RIO)	C	Dividend	L	T					
172. ROYAL DUTCH SHELL PLC SPON ADR A (RDSA)	B	Dividend	K	T					
173. SANTOS LIMITED ADR UNSPONSORED (SSLTY)		None			Sold	01/30/18	J		
174. SOUTHERN COPPER CORP (SCCO)	A	Dividend	J	T					
175. TAIWAN SEMICONDUCTOR MF LTD SPON ADR (TSM)	A	Dividend	J	T					
176. TEXAS INSTRS INC (TXN)	A	Dividend	K	T					
177. TIMEWARNER INC COM NEW (TWX)	A	Dividend			Sold	06/15/18	J		
178. TOTAL SA SPONSORED ADR (TOT)	B	Dividend	K	T					
179. TWENTY FIRST CENTURY FOX INC CL B (FOX)	A	Dividend	J	T					
180. WAL MART STORES INC (WMT)	A	Dividend	J	T					
181. WEYERHAEUSER CO REIT (WY)		None			Sold	01/30/18	J		
182. TRUST #2 (H)									
183. DFA INTL SM CAP VAL PORT (DISVX)	A	Dividend			Buy	01/31/18	M		
184.					Sold	11/15/18	M		
185. DFA EMERGING MKTS PTF (DFEMX)	A	Dividend			Buy	01/31/18	L		
186.					Sold	11/15/18	L		

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 15 of 18

Name of Person Reporting

BEETLESTONE, WENDY

Date of Report

08/03/2019

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)
187. CHEVRON CORP NEW (CVX)		None			Sold	01/30/18	L		
188. CONOCOPHILLIPS (COP)		None			Sold	01/30/18	K		
189. ENI SPA SPON ADR (E)		None			Sold	01/30/18	J		
190. EXXON MOBIL CORP (XOM)		None			Sold	01/30/18	K		
191. FREEPORT MCMORAN COPPER & GOLD (FCX)		None			Sold	01/30/18	J		
192. HESS CORP (HES)		None			Sold	01/30/18	K		
193. IMPERIAL OIL LTD COM NEW (IMO)	A	Dividend			Sold	01/30/18	K		
194. MARATHON OIL CORP (MRO)		None			Sold	01/30/18	J		
195. MARATHON PETE CORP (MPC)		None			Sold	01/30/18	K		
196. OCCIDENTAL PETE CORP DEL (OXY)	A	Dividend			Sold	01/30/18	K		
197. PHILLIPS 66 (PSX)		None			Sold	01/30/18	K		
198. RELIANCE INFRASTRUCTURE LTD GDR (RELFE)		None			Sold	01/30/18	J		
199. ROYAL DUTCH SHELL PLC SPON ADR A (RDSA)		None			Sold	01/30/18	J		
200. SASOL LTD SPON ADR (SSL)		None			Sold	01/30/18	J		
201. TOTAL SA SPON ADR (TOT)	A	Dividend			Sold	01/30/18	L		
202. 403(b) #1 (H)									
203. VANGUARD WELLINGTON FUND INV		None	N	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	

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)
204. VANGUARD PRIMECAP FUND ADMIRAL		None	N	T					
205. VANGUARD TARGET RETIREMENT 2025		None	M	T					
206. 403(b) #2 (H)									
207. CREF STOCK R3		None	P1	T					
208. CREF GLOBAL EQUITIES R3		None	M	T					
209. TIAA REAL ESTATE		None	J	T					
210. T-C INTL EQ RTMT	C	Dividend	M	T					
211. TIAA TRADITIONAL	B	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 17 of 18

Name of Person Reporting

BEETLESTONE, WENDY

Date of Report

08/03/2019

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.

Part VII, line 140 (2017): This asset became unreportable without a corresponding reportable transaction.

FINANCIAL DISCLOSURE REPORT

Page 18 of 18

Name of Person Reporting

BEETLESTONE, WENDY

Date of Report

08/03/2019

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