

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) Wolfson, Freda L.	2. Court or Organization United States District Court for the District of New Jersey	3. Date of Report 5/13/2020
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) Article III District Judge, Active, Full-time	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2019 to 12/31/2019
7. Chambers or Office Address Clarkson S. Fisher U.S. Courthouse 402 East State Street Trenton, New Jersey 08608		
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. Douglas Residential College Dean's Advisory Board, Member (non-compensated)	Douglas Residential College
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.	

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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.		
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	Weingarten Law Firm LLC - salary
2. 2019	Commerce Center at Cherry Hill - earned bonus
3. 2019	Greenbaum Rowe Smith & Davis LLP - legal fees
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.	Jack and Sheryl Morris through M&M Aviation Partners	2/14/2019, 2/18/2019	New Jersey to Nassau, Bahamas and return	Personal vacation	Transportation
2.	Jack and Sheryle Morris through JSM at Stelton LLC	2/14/2019 - 2/18/2019	Nassau, Bahamas	Personal vacation	Lodging and meals
3.	Jack and Sheryl Morris through M&M Aviation Partners	1/24/2019	Florida to New Jersey	Personal vacation	Transportation
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.)

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.		
2.		
3.		
4.		
5.		

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. Bank of America (various accounts)	A	Interest	K	T					
2. Charles Schwab & Co., Inc. Custodial IRA (H)									
3. - Blackrock Strat Incm Potty Port Instl: BSIIX	A	Dividend	K	T					
4. - Goldman Sachs Strategic Incm Fd Inst: GSZIX	A	Dividend	K	T					
5. - IShares Russell Mid Cap: IWP	A	Dividend	K	T					
6. - IShares S&P 500 Growth: IVW	B	Dividend	L	T					
7. -JPMorgan Strategic Income Opportunities Fund Class: JSOSX	A	Dividend	K	T					
8. -JPMorgan Diversified Altrntivs ETF: JPHF	B	Dividend	K	T					
9. - Powershares Emerg. Mkts: PCY	A	Dividend	J	T					
10. - SPDR Barclays High Yield: JNK	B	Dividend	J	T					
11. - Vanguard FTSE Developed: VEA	B	Dividend	L	T					
12. - Vanguard High Dividend: VYM	B	Dividend	L	T					
13. - Vanguard Short-Term Bond: BSV	A	Dividend	K	T					
14. - Vanguard Small Cap: VBK	A	Dividend	K	T					
15. - Wisdomtree Midcap: DON	A	Dividend	K	T					
16. - Wisdomtree Smallcap: DES	A	Dividend	K	T					
17. - WisdomTree Emerging Markets SmallCap Dividen Fund: DGS	A	Dividend	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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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

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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: s/ **Freda L. Wolfson**

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
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