AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2022

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 13101-13111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
Bartle III, Harvey	U.S. District Court, E.D. Pa.	5/3/2023
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)	**5a. Report Type (check appropriate type)**	**6. Reporting Period**
U.S. District Judge (Senior Status)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
16614 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 Guide to Judiciary Policy, Volume 2D, Ch. 3, § 345 Trustees, Executors, Administrators, and Custodians; § 350 Power of Attorney; § 355 Outside Positions.)*

☑ NONE *(No reportable positions.)*

	POSITION	NAME OF ORGANIZATION/ENTITY
1.		
2.		
3.		
4.		
5.		

II. AGREEMENTS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 340 Agreements and Arrangements)*

☑ NONE *(No reportable agreements.)*

	DATE	PARTIES AND TERMS
1.		
2.		
3.		

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 320 Income; § 360 Spouses and Dependent Children.)*

A. Filer's Non-Investment Income

☑ NONE *(No reportable non-investment income.)*

	DATE	SOURCE AND TYPE	INCOME (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.)*

	DATE	SOURCE
1.	2022	Texas Teachers Retirement System - Pension
2.		
3.		
4.		

IV. REIMBURSEMENTS *-- transportation, lodging, food, entertainment.*

(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)

☑ NONE *(No reportable reimbursements.)*

	SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.					
2.					
3.					
4.					
5.					

V. GIFTS. *(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)*

☑ NONE *(No reportable gifts.)*

	SOURCE	DESCRIPTION	VALUE
1.			
2.			
3.			
4.			
5.			

VI. LIABILITIES. *(Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 335 Liabilities; § 360 Spouses and Dependent Children.)*

☑ NONE *(No reportable liabilities.)*

	CREDITOR	DESCRIPTION	VALUE CODE
1.			
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Bartle III, Harvey	5/3/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A		B		C		D				
Description of Assets (including trust assets)		Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure		(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)	
1.	Eastman Kodak (Com.)		None	J	T					
2.	IBM (Com.)	C	Dividend	L	T					
3.	Xerox (Com.)	A	Dividend	J	T					
4.	Johnson & Johnson	B	Dividend	L	T					
5.	Bank of America Corp.	B	Dividend	L	T					
6.	CitiCorp. Inc.	B	Dividend	K	T					
7.	Delphi Automotive Systems (Com.)		None	J	T					
8.	TD Bank	A	Interest	L	T					
9.	Wells Fargo Bank	A	Interest	J	T					
10.	Vanguard-Windsor II (IRA Rollover)	D	Distribution	M	T					
11.	Merrill Lynch (Mercury U.S. Large Cap Fund Class B)		None	J	T					
12.	Vanguard (Wellington Fund Admr)	E	Dividend	N	T	Buy (add'l)	02/07/22	K		
13.						Buy (add'l)	08/01/22	J		
14.	Vanguard (Wellington Fund Admr)	F	Dividend	O	T	Buy (add'l)	02/01/22	K		
15.						Buy (add'l)	08/01/22	J		
16.	Vanguard (Pa. Long Term Tax Exempt Fund)	A	Interest	K	T					
17.	American Mut. Fd. Inc. A	B	Dividend	M	T					

1 Income Gain Codes: (See Columns B1 and D4)	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
	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 (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	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 (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

Name of Person Reporting	Date of Report
Bartle III, Harvey	5/3/2023

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

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Description of Assets (including trust assets)	Income during reporting period		Gross value at end of reporting period		Transactions during reporting period				
Place "(X)" after each asset exempt from prior disclosure	(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)	
18. Fundamental Invs. Inc. Class A	A	Dividend	L	T					
19. Philadelphia Contributionship	A	Dividend	J	T					
20. Chester County Pa School Auth. Bond	A	Interest			Redeemed	04/01/22	J	A	
21. Moon Area School Dist. Pa Bond	A	Interest			Sold	07/18/22	K	A	
22. State Pub. School Bldg. Auth. Pa Bond	A	Interest			Sold	07/18/22	J	A	
23. Commonwealth Fing. Authority Pa Bond	A	Interest			Sold	07/18/22	J	A	
24. Pa. Economic Dev. Fing. Authority Bond	A	Interest			Sold	07/18/22	K	A	
25. Troy, Pa Area School Dist. Bradford County Bond	A	Interest			Sold	07/18/22	J	A	
26. Blackrock Long Term Mun. Advisor Trust	B	Dividend	L	T					
27. BYN Mellon Muni Bd Fund	B	Dividend	K	T					
28. Indiana State Fin Auth Wastewater Util Rev	A	Interest			Sold	07/18/22	J	A	
29. Palm Desert CA Redev. Agy	A	Interest			Sold	06/06/22	J	A	
30. Clackamas Cnty Org. Sch. Dist	A	Interest			Sold	07/18/22	J	A	
31. Wisconsin Hsg. & Econ Dev. Auth	A	Interest			Sold	07/18/22	J	A	
32. Scranton Pa. Sch Dist GO	A	Interest			Sold	07/18/22	J	A	
33. Alerian MLP	C	Dividend	K	T					
34. Blackrock Muniyield PA Quality Fund	B	Dividend	K	T	Buy (add'l)	07/15/22	J		

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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)
35.	Eaton Vance PA Muni. Income Trust Fund	B	Dividend	K	T	Buy (add'l)	07/15/22	K	
36.	Invesco PA Value Muni Income Trust	A	Dividend	J	T	Buy (add'l)	07/15/22	K	
37.	QVC Inc. 6.375% PFD	C	Interest	K	T				
38.	Monroe County NY Pub	A	Interest			Sold	07/18/22	J	A
39.	New Mexico Mtg. Fin Auth	A	Interest			Redeemed (part)	01/03/22	J	A
40.						Sold	05/16/22	J	A
41.	Ebert Met Dist Co RFDG	A	Interest			Sold	07/18/22	J	A
42.	West VA St, HSG Dev. Fund	A	Interest			Sold	07/18/22	J	A
43.	MetLife Inc. 5.625% Pfd	B	Dividend	K	T				
44.	J.P. Morgan Ser. DD Pfd	B	Dividend	K	T				
45.	Wells Fargo 5.625% Pfd	B	Dividend	K	T				
46.	Lake Mun. Util Dist TX	A	Interest			Sold	07/18/22	J	A
47.	Kent St. Univ. Revs BSD 2019	A	Interest			Sold	07/18/22	J	A
48.	Connellsville PA Area Sch Dist RFDG	A	Interest			Sold	07/18/22	J	A
49.	Capital One Fin. 5% Pfd	B	Dividend	K	T				
50.	Citizens Finl Corp. 5% Pfd	A	Dividend	J	T				
51.	New Castle PA Swr. Rev.	A	Interest			Sold	07/18/22	J	A

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52. State Pub. School Bldg Auth (Pa-Allegheny County)	A	Interest			Sold	07/18/22	J	A	
53. Selective Ins. Group Pfd	A	Dividend	J	T					
54. Stifel Fin. Corp. Pfd	B	Dividend	K	T	Buy (add'l)	02/03/22	J		
55. North Lebanon Pa Sch Dist	A	Interest			Sold	07/18/22	J	A	
56. Lackawana County, Pa Bonds	A	Interest			Sold	07/18/22	J	A	
57. II - IV Inc.	A	Dividend	K	T	Buy	02/03/22	K		
58. Washington Fed Inc PFD	A	Dividend	J	T	Buy	02/03/22	J		
59. Service PPTYS Tr.	B	Dividend	J	T	Buy	02/03/22	J		
60. Alliance Bernstein Nat'l Mun Income FD	A	Interest	K	T	Buy	07/19/22	K		
61. Bladstone / GSO Strategic Credit Fd	B	Interest	K	T	Buy	07/19/22	K		
62. BNY Mellon Strategic Munis Inc	A	Dividend	K	T	Buy	07/19/22	K		
63. Clarion County Pa Rev Bds	A	Interest	J	T	Buy	04/18/22	J		
64.					Sold	07/18/22	J	A	
65. Pioneer Mem. High Income Fund	A	Int./Div.	K	T	Buy	07/15/22	K		
66. Coherent Corp	A	Dividend	J	T	Buy	02/01/22	J		
67. TIAA/Cref (Retirement Funds) (see 65-106)									
68. Univ. of Texas Optional Ret. Plan Fixed Annuity - TIAA	C	Distribution	L	T					

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69.	Wellesley College Ret. Plan FIXED Annuities Ret. Plan	C	Distribution	L	T					
70.	Phila. Health & Ed. Corp. DC Ret. Plan FIXED Annuities TIAA/Cref	B	Distribution	K	T					
71.	Drexel Univ. Contrib. Ret. Plan Fixed Annuities -TIAA/Cref	B	Distribution	K	T					
72.	AMG Times Sq. Int. Small Cap	A	Dividend			Sold	04/25/22	J	A	
73.	Harding Loevner Inst. Mkts. Class I	A	Dividend	J	T	Buy (add'l)	11/01/22	J	A	
74.	Hartford Emerging Mkts. Equity Fd. Class Y	A	Distribution	J	T	Buy (add'l)	11/01/22	J		
75.	Nuveen Small Cap Value Opp. Fd.	A	Distribution	J	T	Sold (part)	04/25/22	J	A	
76.						Buy (add'l)	11/02/22	J		
77.	Nuveen Small Cap Growth Opps Fd	A	Distribution	J	T	Buy (add'l)	11/01/22	J		
78.						Sold (part)	11/01/22	J		
79.	PIMCO Emerging MKTS Bond Fd	A	Distribution	J	T	Sold (part)	11/01/22	J	A	
80.	TIAA/Cref International Equity Fd	A	Distribution	K	T	Buy (add'l)	11/01/22	J		
81.	TIAA/Cref Large Cap. Growth Class I	A	Distribution	K	T	Buy (add'l)	11/01/22	J		
82.	TIAA/Cref Bond Fd	B	Distribution	L	T	Sold (part)	10/17/22	J	A	
83.						Sold (part)	11/01/22	K	A	
84.	TIAA/Cref Large Cap Value - Index Fd	A	Distribution	K	T	Sold (part)	04/12/22	J	A	
85.						Sold (part)	11/01/22	K	A	

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86.					Buy (add'l)	11/01/22	J		
87. TIAA/Cref Large Cap Growth Index Class I	A	Distribution	K	T	Buy (add'l)	11/03/22	J		
88.					Buy (add'l)	12/13/22	J		
89. TIAA/Cref Large Cap Value Class I	A	Distribution	K	T	Buy (add'l)	11/01/22	J		
90.					Buy (add'l)	12/20/22	J		
91. TIAA/Cref Bond Index - Index Fd	B	Distribution	L	T	Sold (part)	03/11/22	J	A	
92.					Sold (part)	11/01/22	J	A	
93. TIAA/Cref - High Yield Class I	A	Distribution	J	T	Sold (part)	11/01/22	J		
94. Victory R S Mid Cap Growth Fd	A	Dividend			Buy (add'l)	11/01/22	J		
95.					Sold (part)	11/02/22	J	A	
96.					Sold	11/03/22	J	A	
97. AllSpring Special Mid-Cap Value Fd	A	Dividend	J	T	Sold (part)	08/12/22	J	A	
98.					Sold (part)	11/01/22	J	A	
99. J.P. Morgan Mid-Cap Growth Fd	A	Dividend	J	T	Buy	11/02/22	J	A	
100. IShares Tr Russell Mid-Cap Value ETF	A	Dividend	J	T	Sold (part)	04/25/22	J	A	
101.					Buy (add'l)	11/01/22	J	A	
102. IShares Tr Russell Mid-Cap Growth ETF	A	Dividend	J	T					

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ 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 (1) Amount Code 1 (A-H)	B (2) Type (e g , div , rent, or int)	C Gross value at end of reporting period (1) Value Code 2 (J-P)	C (2) Value Method Code 3 (Q-W)	D Transactions during reporting period (1) Type (e g , buy, sell, redemption)	D (2) Date mm/dd/yy	D (3) Value Code 2 (J-P)	D (4) Gain Code 1 (A-H)	
103. IShares Tr Russell 2000 Value ETF	A	Dividend	J	T	Sold (part)	11/01/22	J	A	
104. IShares Tr Russell 2000 Growth ETF	A	Dividend	J	T	Sold (part)	11/01/22	J	A	
105. IShares TR MSCI EAFE Small Cap. ETF	A	Dividend	J	T					
106. IShares TR CORE MSCI EAFE ETF	A	Dividend	K	T	Buy (add'l)	11/01/22	J		
107. IShares Inc CORE MSCI Emerging MTKS ETF	A	Dividend	J	T					
108. IShares TR Broad USD High Yield Cap BDETF	A	Dividend	J	T	Sold (part)	11/01/22	J	A	

1 Income Gain Codes: (See Columns B1 and D4)	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
	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 (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	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 (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

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

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Name of Person Reporting	Date of Report
Bartle III, Harvey	5/3/2023

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. § 13141 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ Harvey Bartle III

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. § 13106)

Committee on Financial Disclosure
Administrative Office of the United States Courts
Suite G-330
One Columbus Circle, N.E.
Washington, D.C. 20544