AO 10
Rev. 1/2021

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2021

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)	2. Court or Organization	3. Date of Report
Beetlestone, Wendy	U.S. District Court - Eastern District of Pennsylvania	08/15/2022
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 (Active)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☑ Amended Report	01/01/2021 **to** 12/31/2021
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.		

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.)*

	DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1.	2021	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.)*

	DATE	SOURCE AND TYPE
1.	2021	The Trustees of the University of Pennsylvania (salary)
2.	11/17/2021	Emory University (honoraria, $750)
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.)*

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

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.			

Name of Person Reporting	Date of Report
Beetlestone, Wendy	08/15/2022

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)	B. Income during reporting period		C. Gross value at end of reporting period		D. 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)	(5) Identity of buyer/seller (if private transaction)
1.	Individual Assets (H)									
2.	Wells Fargo (cash)	A	Interest	L	T					
3.	PNC Bank (cash)	A	Interest	K	T					
4.	Account #1 (H)									
5.	DFA Intl Real Estate Sec PTF (DFITX)	A	Dividend	L	T	Buy (add'l)	12/13/21	J		
6.	DFA Real Estate PT (DFREX)	B	Dividend	L	T	Sold (part)	12/03/21	J		
7.	Account #2 (H)									
8.	Vanguard Total Bond Market Index Inst (VBTIX)	A	Dividend			Sold	04/02/21	N		
9.	Vanguard Value Index Fund Inv (VIVAX)		None			Sold	04/02/21	N		
10.	Vanguard Small-Cap Value Index (VISVX)		None			Sold	04/02/21	M		
11.	Vanguard Total Intl Stock Index Inv (VGTSX)		None			Sold	04/02/21	N		
12.	Vanguard Real Estate Index Investor (VGSIX)		None			Sold	04/02/21	L		
13.	Vanguard Inter-Term Bond Index Inv (VBIIX)	A	Dividend			Sold	04/02/21	N		
14.	Vanguard International Value Fund (VTRIX)		None			Sold	04/02/21	M		
15.	Vanguard Small - Cap Index Fund Inv (NAESX)		None			Sold	04/02/21	M		
16.	Vanguard Emerging Markets Stock Index Inst (VEMIX)		None			Sold	04/02/21	L		
17.	Vanguard Total Stock Market Index Inst Plus (VSMPX)		None			Sold	04/02/21	M		

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		

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☐ 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)	D. (5) Identity of buyer/seller (if private transaction)
18. Account #3 (H)									
19. Vang Intr-Trm Treasury Adm (VFIUX)	C	Dividend	O	T	Buy	04/02/21	O		
20. BlackRock Total Return K (MPHQX)	D	Dividend	N	T	Buy	04/02/21	N		
21. Vang Inst Idx Inst Plus (VIIIX)	E	Dividend	O	T	Buy	04/02/21	O		
22. Vang Emr Mkts Stk Idx Ins (VEMIX)	B	Dividend	L	T	Buy	04/02/21	L		
23. Vanguard Rl Est Idx Inst (VGSNX)	B	Dividend	L	T	Buy	04/02/21	L		
24. Vang Devlopd Mkts Idx Ins (VTMNX)	D	Dividend	N	T	Buy	04/02/21	N		
25. Vanguard Sm Idx Inst Pls (VSCPX)	C	Dividend	N	T	Buy	04/02/21	N		
26. T-C Real Est Secs-Rtmt	A	Dividend	K	T	Buy	02/02/21	K		
27. T-C S&P 500 Idx-Rtmt	C	Dividend	M	T	Buy	04/02/21	M		
28. T-C Lg-Cap Val Idx-Rtmt	C	Dividend	M	T	Buy	04/02/21	M		
29. T-C Sm-Cap Bl Idx-Rtmt	D	Dividend	M	T	Buy	04/02/21	M		
30. T-C Intl Eq Idx-Rtmt	C	Dividend	M	T	Buy	04/02/21	M		
31. T-C Short-Term Bond-Rtmt	B	Dividend	M	T	Buy	04/02/21	M		
32. T-C Infl-Lnkd Bond-Rtmt	D	Dividend	M	T	Buy	04/02/21	M		
33. TIAA Traditional		None	M	T	Sold (part)	04/01/21	J		
34. T-C Lifecycle Index 2025-Inst (M04350I-1)		None			Sold	04/02/21	J		

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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
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35. CREF Stock R3		None			Sold	04/02/21	K		
36. CREF Global Equities R3		None			Sold	04/02/21	K		
37. CREF Social Choice R3		None			Sold	04/02/21	K		
38. TIAA Real Estate		None			Sold	04/02/21	K		
39. Account #4 (H)									
40. TD Ameritrade Deposit Account IDA12 (MMDA12) (cash)	A	Interest	K	T					
41. DFA Emerging Markets Core Equity I (DFCEX)	B	Dividend	L	T					
42. DFA Intl Sm Co Inst (DFISX)	A	Dividend	J	T	Buy	11/05/21	J		
43. DFA Real Estate PT (DFREX)	B	Dividend	L	T					
44. DFA Commodity Strat Inst (DCMSX)		None			Buy	11/05/21	K		
45.					Sold	12/08/21	K		
46. DFA Fund Advisors US Lg Cap Growth Inst (DUSLX)	B	Dividend	K	T	Buy	12/08/21	K		
47. DFA International Value I (DFIVX)	B	Dividend	K	T					
48. DFA US Large Co Portfolio (DFUSX)	C	Dividend	K	T					
49. Federated Hermes Govt Obligations Service (GOSXX) (cash eq)	A	Dividend	K	T					
50. Amazon Com Inc (AMZN)		None	M	T					
51. American Express Co (AXP)	A	Dividend	K	T					

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52. AT&T (T)	A	Dividend	J	T					
53. Caterpillar Inc Del (CAT)	A	Dividend	K	T					
54. Coca Cola Co (KO)	A	Dividend	J	T					
55. Comcast Corp New Cl A SPL (CMCSA)	A	Dividend	J	T					
56. Emerson Elec Co (EMR)	A	Dividend	J	T					
57. Expedia Inc Del Com New (EXPE)		None	J	T					
58. Exxon Mobil Corp (XOM)	B	Dividend	K	T					
59. Intel Corp (INTC)	A	Dividend	K	T					
60. JP Morgan Chase & Co Com (JPM)	A	Dividend	K	T					
61. Kimberly Clark Corp (KMB)	A	Dividend	J	T					
62. Microsoft Inc (MSFT)	A	Dividend	L	T					
63. Mondelez Intl Inc Cl A (MDLZ)	A	Dividend	J	T					
64. Occidental Pete Corp Del (OXY)	A	Dividend			Sold	11/05/21	J		
65. Paypal Holdings Inc (PYPL)		None	K	T					
66. Pepsico Inc (PEP)	A	Dividend	K	T					
67. Procter & Gamble Co (PG)	A	Dividend	K	T					
68. Raytheon Co Com New (RTN)	A	Dividend	K	T					

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69. Rio Tinto PLC Spon ADR (RIO)	E	Dividend	M	T					
70. Royal Dutch Shell PLC Spon ADR A (RDSA)	A	Dividend	K	T					
71. Taiwan Semiconductor MF LTD Spon ADR (TSM)	A	Dividend	K	T					
72. Texas Instrs Inc (TXN)	A	Dividend	K	T					
73. Total SE Sponsored ADR (TOT)	B	Dividend			Sold	11/05/21	K		
74. WalMart Stores Inc (WMT)	A	Dividend	J	T					
75. Disney Walt Co Com Disney (DIS)		None	K	T					
76. Account #5 (H)									
77. TD Ameritrade Deposit Account IDA12 (MMDA12) (cash)	A	Interest	L	T					
78. Dimensional ETF Tr US Targeted Value ETF (DFAT)	A	Dividend	L	T	Buy	11/05/21	L		
79. Denton Tex For Issues Dtd Pri Go Ref and Impt Bds (248866P25)	B	Interest	L	T					
80. Grapevine-Colleyville Indpt Sc Ultd Tax Sch Bds (3886403H5)	C	Interest	M	T					
81. Grapevine-Colleyville Indpt SC Ultd Tax Sch Bldg Bds 5% (3886404C5)	B	Interest	K	T					
82. Hawaii St Go Bds Call Pre-Ref (419792KV7)	C	Interest			Sold	12/01/21	L		
83. Hawaii St Go Bds (419792ME3)	C	Interest	M	T					
84. King Cnty Wash Sch Dist No 405 Ultd Tax Go And Ref Bds (495098YQ2)	C	Interest	L	T					
85. King Cnty Wash Sch Dist 411 Ultd Tax Go Ref Bds 5% (4952242D8)	B	Interest			Sold	12/01/21	K		

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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
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3. Value Method Codes (See Column C2)
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86. Montgomery Cnty PA Go Bds (6135794U2)	C	Interest	L	T					
87. New York NY Go Bds (64966MST7)	C	Interest	M	T					
88. Ohio State Go Ref Bds (677521EQ5)	C	Interest	L	T					
89. Putnam County Tenn Go Sch Ref Bds 5% (746673YJ5)	B	Interest	L	T					
90. Sheldon Tex Indpt Sch Dist Ultd Tax Sch Bldg Ref B (8225165J5)	C	Interest	L	T					
91. State BK India Chicago ILL Cd 2.05% (856283L87)	B	Interest	M	T					
92. Trinity River Auth Tex Regl Rev Bds (89658HUA6)	C	Interest	M	T					
93. University Tex Univ Revs Rev Bds (9151377Q0)	C	Interest			Sold	08/16/21	L		
94. Wisconsin St Go Ref BDS CLBL 5% (97705MBT1)	B	Interest	L	T					
95. Wylie Tex Indpt Sch Dist Ultd Tax Ref Bds 4% (983068F77)	B	Interest	L	T					
96. DFA US Social Core Equity 2 (DFUEX)	E	Dividend	O	T					
97. DFA Intl Real Estate Sec PTF (DFITX)	C	Dividend	K	T					
98. DFA Inflation Pro Sec Inst (DIPSX)	D	Dividend	M	T					
99. DFA Emerging Markets Social Core PTF (DFESX)	C	Dividend	M	T					
100. DFA US Hi Relative Prof (DURPX)	E	Dividend	O	T					
101. DFA Intl Hi Relative Profitablty I (DIHRX)	A	Dividend	L	T	Buy	11/05/21	L		
102. DFA US Sm Cap Growth Inst (DSCGX)	C	Dividend	L	T	Buy	11/05/21	L		

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103. DFA Invmt Grade Inst (DFAPX)	B	Dividend	L	T	Buy	08/17/21	L		
104. DFA Intl Social Core Equity Port (DSCLX)	E	Dividend	N	T					
105. DFA Two-Year Govt Inst (DFYGX)		None	L	T	Buy	12/08/21	M		
106.					Sold (part)	12/28/21	L		
107. Vanguard Sh Tm Inf Protctd Sec IDX Admrl (VTAPX)	D	Dividend	M	T	Buy	04/23/21	M		
108.					Buy (add'l)	08/17/21	K		
109. DFA LTIP Inst (DRXIX)	A	Dividend			Sold	04/23/21	M		
110. American Water Works Co Inc New (AWK)	A	Dividend	L	T					
111. BP PLC Spon ADR (BP)	C	Dividend	K	T	Sold (part)	11/05/21	K		
112. California Water SVC Group (CWT)	B	Dividend	L	T					
113. Essential Utilities Inc (WTRG)	A	Dividend	K	T					
114. Exxon Mobil Corp (XOM)	D	Dividend	M	T	Sold (part)	11/05/21	L		
115. Marathon Pete Corp (MPC)	D	Dividend	M	T	Sold (part)	11/05/21	L		
116. Middlesex Water Co (MSEX)	A	Dividend	K	T					
117. Phillips 66 (PSX)	B	Dividend	K	T	Sold (part)	11/05/21	K		
118. Royal Dutch Shell PLC Spon ADR A (RDS.A)	D	Dividend	M	T	Sold (part)	11/05/21	L		

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
Beetlestone, Wendy	08/15/2022

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

Parenthetical numbers in Part VII are CUSIP numbers.

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.

Name of Person Reporting	Date of Report
Beetlestone, Wendy	08/15/2022

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
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