AO 10
Rev. 1/2021

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2022

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	05/12/2023
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 (Active)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2022 **to** 12/31/2022
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.	2022	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.	2022	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.)*

	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	05/12/2023

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	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)	(5) Identity of buyer/seller (if private transaction)
1. Individual Assets (H)									
2. Wells Fargo (cash)	A	Interest	K	T					
3. PNC Bank (cash)	A	Interest	M	T					
4. Account #1 (H)									
5. DFA Intl Real Estate Sec PTF (DFITX)		None	L	T	Sold (part)	12/12/22	J		
6. DFA Real Estate PT (DFREX)	C	Dividend	L	T					
7. Account #2 (H)									
8. Vang Inst Idx Inst Plus (VIIIX)	D	Dividend	N	T					
9. Vang Emr Mkts Stk Idx Ins (VEMIX)	B	Dividend	L	T					
10. Vanguard Rl Est Idx Inst (VGSNX)	B	Dividend	K	T					
11. Vang Developed Mkts Idx Ins (VTMNX)		None			Sold	02/10/22	N		
12. Vang Developed Mkts Idx Ins Pls (VDIPX)	D	Dividend	N	T	Buy	02/10/22	N		
13. Vanguard Sm Idx Inst Pls (VSCPX)	D	Dividend	N	T					
14. Vang Intr-Trm Treasury Adm (VFIUX)	D	Dividend	N	T					
15. BlackRock Total Return K (MPHQX)	D	Dividend	N	T					
16. T-C Real Est Secs-Rtmt	A	Dividend	K	T	Sold (part)	04/01/22	J		
17. T-C S&P 500 Idx-Rtmt	B	Dividend	M	T	Sold (part)	04/01/22	J		

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	05/12/2023

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	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)	(5) Identity of buyer/seller (if private transaction)
18. T-C Lg-Cap Val Idx-Rtmt	C	Dividend	M	T	Sold (part)	04/01/22	J		
19. T-C Sm-Cap Bl Idx-Rtmt	B	Dividend	L	T	Sold (part)	04/01/22	J		
20. T-C Intl Eq Idx-Rtmt	C	Dividend	M	T	Sold (part)	04/01/22	J		
21. T-C Short-Term Bond-Rtmt	C	Dividend	M	T	Sold (part)	04/01/22	J		
22. T-C Infl-Lnkd Bond-Rtmt	D	Dividend	M	T	Sold (part)	04/01/22	J		
23. TIAA Traditional		None	M	T	Sold (part)	04/01/22	J		
24. Account #3 (H)									
25. TD Ameritrade Deposit Account IDA12 (MMDA12) (cash)	A	Interest	K	T					
26. DFA Tr Core Fixed Income (DFCF)	A	Dividend	K	T	Buy	10/24/22	K		
27. DFA Emerging Markets Core Equity I (DFCEX)	B	Dividend	L	T					
28. DFA Intl Sm Co Inst (DFISX)	A	Dividend	J	T					
29. DFA Real Estate PT (DFREX)	C	Dividend	L	T					
30. DFA Fund Advisors US Lg Cap Growth Inst (DUSLX)	B	Dividend	K	T					
31. DFA International Value I (DFIVX)	B	Dividend	K	T					
32. DFA US Large Co Portfolio (DFUSX)	B	Dividend	K	T					
33. Federated Hermes Govt Obligations Service (GOSXX) (cash eq.)	A	Dividend	K	T					
34. Amazon Com Inc (AMZN)		None	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
Beetlestone, Wendy	05/12/2023

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	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)	(5) Identity of buyer/seller (if private transaction)
35. American Express Co (AXP)	A	Dividend	J	T					
36. AT&T (T)	A	Dividend	J	T					
37. Caterpillar Inc Del (CAT)	A	Dividend	K	T					
38. Coca Cola Co (KO)	A	Dividend	J	T					
39. Comcast Corp New Cl A SPL (CMCSA)	A	Dividend	J	T					
40. Emerson Elec Co (EMR)	A	Dividend	J	T					
41. Expedia Inc Del Com New (EXPE)	A	Dividend	J	T					
42. Exxon Mobil Corp (XOM)	B	Dividend	L	T					
43. Intel Corp (INTC)	A	Dividend	J	T					
44. JP Morgan Chase & Co Com (JPM)	A	Dividend	J	T					
45. Kimberly Clark Corp (KMB)	A	Dividend	J	T					
46. Microsoft Inc (MSFT)	A	Dividend	L	T					
47. Mondelez Intl Inc Cl A (MDLZ)	A	Dividend	J	T					
48. Paypal Holdings Inc (PYPL)		None	J	T					
49. Pepsico Inc (PEP)	A	Dividend	K	T					
50. Procter & Gamble Co (PG)	A	Dividend	K	T					
51. Raytheon Co Com New (RTN)	A	Dividend	K	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
Beetlestone, Wendy	05/12/2023

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	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)	(5) Identity of buyer/seller (if private transaction)
52. Rio Tinto PLC Spon ADR (RIO)	D	Dividend	M	T					
53. Shell Plc Adr (SHEL)	A	Dividend	K	T					
54. Taiwan Semiconductor MF LTD Spon ADR (TSM)	A	Dividend	J	T					
55. Texas Instrs Inc (TXN)	A	Dividend	K	T					
56. WalMart Stores Inc (WMT)	A	Dividend	J	T					
57. Disney Walt Co Com Disney (DIS)		None	J	T					
58. Account #4 (H)									
59. TD Ameritrade Deposit Account IDA12 (MMDA12) (cash)	A	Interest	J	T					
60. Dimensional ETF Tr US Targeted Value ETF (DFAT)	A	Dividend	K	T	Sold (part)	10/24/22	K		
61. Denton Tex For Issues Dtd Pri Go Ref and Impt Bds (248866P25)	B	Interest	L	T					
62. Grapevine-Colleyville Indpt Sc Ultd Tax Sch Bds (3886403H5)	C	Interest	M	T					
63. Grapevine-Colleyville Indpt SC Ultd Tax Sch Bldg Bds 5% (3886404C5)	B	Interest	K	T					
64. Hawaii St Go Bds (419792ME3)	C	Interest	M	T					
65. King Cnty Wash Sch Dist No 405 Ultd Tax Go And Ref Bds (495098YQ2)	C	Interest	L	T					
66. Montgomery Cnty PA Go Bds (6135794U2)	C	Interest	L	T					
67. New York NY Go Bds (64966MST7)	C	Interest	M	T					
68. Ohio State Go Ref Bds (677521EQ5)	C	Interest			Redeemed	09/15/22	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	05/12/2023

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	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)	(5) Identity of buyer/seller (if private transaction)
69. Putnam County Tenn Go Sch Ref Bds 5% (746673YJ5)	B	Interest	L	T					
70. Sheldon Tex Indpt Sch Dist Ultd Tax Sch Bldg Ref B (8225165J5)	B	Interest	L	T					
71. State BK India Chicago ILL Cd 2.05% (856283L87)	C	Interest	M	T					
72. Trinity River Auth Tex Regl Rev Bds (89658HUA6)	C	Interest			Redeemed	08/01/22	L		
73. United States Treasury Notes .125% 10/15/2023 (91282CAP6)		None	M	T	Buy	10/25/22	M		
74. United States Treasury Notes .125% 05/31/2023 (91282CCD1)	A	Interest	M	T	Buy	10/25/22	M		
75. United States Treasury Notes .125% 08/31/2023 (91282CCU3)		None	M	T	Buy	10/25/22	M		
76. Wisconsin St Go Ref BDS CLBL 5% (97705MBT1)	C	Interest	L	T					
77. Wylie Tex Indpt Sch Dist Ultd Tax Ref Bds 4% (983068F77)	B	Interest			Redeemed	08/15/22	K		
78. DFA US Social Core Equity 2 (DFUEX)	E	Dividend	O	T	Sold (part)	10/24/22	L		
79. DFA Intl Real Estate Sec PTF (DFITX)		None	K	T					
80. DFA Inflation Pro Sec Inst (DIPSX)	D	Dividend	M	T					
81. DFA Emerging Markets Social Core PTF (DFESX)	C	Dividend	L	T					
82. DFA US Hi Relative Prof (DURPX)	E	Dividend	N	T					
83. DFA Intl Hi Relative Profitablty I (DIHRX)	B	Dividend	L	T					
84. DFA US Sm Cap Growth Inst (DSCGX)	B	Dividend	K	T	Sold (part)	10/24/22	J		
85. DFA Invmt Grade Inst (DFAPX)	B	Dividend	L	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
Beetlestone, Wendy	05/12/2023

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	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)	(5) Identity of buyer/seller (if private transaction)
86. DFA Intl Social Core Equity Port (DSCLX)	D	Dividend	M	T	Sold (part)	10/24/22	M		
87. DFA Two-Year Govt Inst (DFYGX)	A	Dividend	L	T					
88. Vanguard Sh Tm Inf Protctd Sec IDX Admrl (VTAPX)	D	Dividend	M	T					
89. American Water Works Co Inc New (AWK)	A	Dividend	L	T					
90. BP PLC Spon ADR (BP)	C	Dividend	L	T					
91. California Water SVC Group (CWT)	A	Dividend	L	T					
92. Essential Utilities Inc (WTRG)	A	Dividend	K	T					
93. Exxon Mobil Corp (XOM)	D	Dividend	M	T					
94. Marathon Pete Corp (MPC)	D	Dividend	N	T					
95. Middlesex Water Co (MSEX)	A	Dividend	K	T					
96. Phillips 66 (PSX)	B	Dividend	L	T					
97. Shell Plc Adr (SHEL)	D	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
Beetlestone, Wendy	05/12/2023

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 45 of the filing instructions.

Name of Person Reporting	Date of Report
Beetlestone, Wendy	05/12/2023

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. § 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