AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2024

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
Beetlestone, Wendy	U.S. District Court - Eastern District of Pennsylvania	08/13/2025
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	01/01/2024 **to** 12/31/2024
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 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.	Adjunct Professor	University of Pennsylvania Law School
2.	Chancellor	University of Liverpool
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.	2024	University of Pennsylvania Law School (teaching stipend)	$6,000.00
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
1.	2024	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 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.	University of Liverpool	July 12-19, 2024	Liverpool, England	Ceremonial Functions of the Chancellor	Transportation, food, lodging
2.	University of Liverpool	December 8-12, 2024	Liverpool, England	Ceremonial Functions of the Chancellor	Transportation, food, lodging
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
Beetlestone, Wendy	08/13/2025

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)	
1.	Individual Assets (H)									
2.	Wells Fargo (cash)	A	Interest	K	T					
3.	PNC Bank (cash)	A	Interest	L	T					
4.	Account #1 (H)									
5.	Schwab Value Advantage Money Market (SWVXX) (cash eq.)	A	Dividend	J	T	Buy	09/12/24	J		
6.						Sold (part)	10/30/24	J		
7.	Dimensional Short Duration Fixed ETF (DFSD)	C	Dividend	M	T	Buy	05/10/24	K		
8.						Buy (add'l)	07/02/24	L		
9.	Dimensional US Real Estate ETF (DFAR)	A	Dividend	J	T	Sold (part)	05/10/24	K		
10.	US Treasury Note	B	Interest			Redeemed	07/01/24	L		
11.	Account #2 (H)									
12.	Vang Inst Idx Inst Plus (VIIIX)	D	Dividend	N	T					
13.	Vang Emr Mkts Stk Idx Ins (VEMIX)	B	Dividend	L	T					
14.	Vanguard Rl Est Idx Inst (VGSNX)	B	Dividend	K	T					
15.	Vang Developed Mkts Idx Ins Pls (VDIPX)	D	Dividend	N	T					
16.	Vanguard Sm Idx Inst Pls (VSCPX)	D	Dividend	N	T					
17.	Vang Intr-Trm Treasury Adm (VFIUX)	D	Dividend	N	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		

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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)	
18. BlackRock Total Rtrn K (MPHQX)	D	Dividend	N	T					
19. BlackRock Total Rtrn Bnd T (MAHQX)	A	Dividend	L	T					
20. Vanguard Instl 500 Indx Trst (VFFSX)	A	Dividend	L	T					
21. T-C Real Est Secs-Rtmt (TRRSX)	A	Dividend	K	T					
22. T-C S&P 500 Idx-Rtmt (TRSPX)	C	Dividend	M	T					
23. T-C Lg-Cap Val Idx-Rtmt (TRCVX)	C	Dividend	M	T					
24. T-C Sm-Cap Bl Idx-Rtmt (VWSYX)	B	Dividend	L	T					
25. T-C Intl Eq Idx-Rtmt (TIQRX)	C	Dividend	M	T					
26. T-C Short-Term Bond-Rtmt (TISRX)	D	Dividend	M	T					
27. T-C Infl-Lnkd Bond-Rtmt (TIKRX)	D	Dividend	M	T					
28. TIAA Traditional	D	Interest	M	T					
29. Account #3 (H)									
30. TD Bank (cash) (Y)									
31. Schwab Value Advantage Money Fund (SWVXX) (cash eq.)	A	Dividend			Buy	09/12/24	K		
32.					Sold	11/21/24	K		
33. Federated Hermes Govt Obligations Service (GOSXX) (cash eq.)	A	Dividend			Sold	01/09/24	K		
34. Amazon Com Inc (AMZN)		None	N	T					

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35. American Express Co (AXP)	A	Dividend	K	T					
36. Caterpillar Inc Del (CAT)	A	Dividend	K	T					
37. Comcast Corp New Cl A SPL (CMCSA)	A	Dividend	J	T					
38. Walt Disney Co (DIS)	A	Dividend	K	T					
39. Emerson Elec Co (EMR)	A	Dividend	J	T					
40. Intel Corp (INTC)	A	Dividend	J	T					
41. JP Morgan Chase & Co Com (JPM)	A	Dividend	K	T					
42. Kimberly Clark Corp (KMB)	A	Dividend	J	T					
43. Microsoft Inc (MSFT)	A	Dividend	L	T					
44. Mondelez Intl Inc Cl A (MDLZ)	A	Dividend	J	T					
45. Paypal Holdings Inc (PYPL)		None	J	T					
46. Pepsico Inc (PEP)	A	Dividend	K	T					
47. Procter & Gamble Co (PG)	A	Dividend	K	T					
48. Rio Tinto PLC Spon ADR (RIO)	D	Dividend	L	T					
49. RTX Corp Com (RTX)	A	Dividend	K	T					
50. Shell Plc Adr (SHEL)	B	Dividend	K	T					
51. Taiwan Semiconductor MF LTD Spon ADR (TSM)	A	Dividend	K	T					

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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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52. Texas Instrs Inc (TXN)	A	Dividend	K	T					
53. The Coca-Cola Co. (KO)	A	Dividend	J	T					
54. WalMart Stores Inc (WMT)	A	Dividend	K	T					
55. DFA Tr Core Fixed Income (DFCF)	B	Dividend			Buy (add'l)	01/08/24	K		
56.					Sold	04/24/24	M		
57. Dimensional U.S. Targeted Value ETF (DFAT)	B	Dividend	L	T					
58. Dimensional US Real Estate ETF (DFAR)	A	Dividend	K	T	Sold (part)	04/09/24	K		
59. Fidelity Total Bond ETF (FBND)	C	Dividend	M	T	Buy	04/24/24	M		
60.					Buy (add'l)	11/21/24	K		
61. DFA Emerging Markets Core Equity I (DFCEX)	B	Dividend	L	T					
62. DFA International Value I (DFIVX)	B	Dividend	K	T					
63. DFA Real Estate Securities PT (DFREX)	A	Dividend			Sold	04/09/24	J		
64. DFA US Large Co Portfolio (DFUSX)	A	Dividend	L	T					
65. Account #4 (H)									
66. TD Bank NA (cash)	A	Interest	M	T					
67. Schwab Value Advantage Money Fund (SWVXX) (cash eq.)	A	Dividend			Sold	01/08/24	J		
68.					Buy	07/02/24	L		

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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 (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)	
69.						Sold	07/24/24	L		
70.						Buy	09/12/24	K		
71.						Sold	11/21/24	K		
72.	United States Treasury Note	A	Interest			Redeemed	01/31/24	L		
73.	Putnam County Tenn Go Sch Ref Bds 5% (746673YJ5)	B	Interest			Redeemed	04/01/24	K		
74.	Montgomery Cnty PA Go Bds (6135794U2)	C	Interest			Redeemed	07/01/24	L		
75.	Grapevine-Colleyville Indpt Sc Ultd Tax Sch Bds (3886403H5)	C	Interest			Redeemed	08/15/24	L		
76.	Denton Tex For Issues Dtd Pri Go Ref and Impt Bds (248866P25)	B	Interest	L	T					
77.	Sheldon Tex Indpt Sch Dist Ultd Tax Sch Bldg Ref B (8225165J5)	C	Interest	L	T					
78.	Wisconsin St Go Ref BDS CLBL 5% (97705MBT1)	C	Interest	L	T					
79.	New York NY Go Bds (64966MST7)	C	Interest	M	T					
80.	Elgin Ill 4%25 Go Utx (286300AC2)	C	Interest	M	T					
81.	Alexander City Alab 5.0% (014519CX8)	D	Interest	M	T					
82.	Wstrn Westmreland P 4% (959886GJ5)	C	Interest	M	T					
83.	Erie PA City SD 5% (295425TS1)	D	Interest	N	T					
84.	Pennsylvania St Hig 5% (0917TAG6)	C	Interest	L	T					
85.	Crawfordsville Ind 4% Bond (225136AS9)		None	M	T	Buy	11/26/24	M		

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2. Value Codes (See Columns C1 and D3)
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Q =Appraisal R =Cost (Real Estate Only) S =Assessment T =Cash Market
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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)	
86.	Pennsylvania St 5% Bond (70914P2C5)		None	M	T	Buy	11/26/24	M		
87.	Maryland St Community Bond (57419TDE8)	C	Interest	M	T	Buy	02/09/24	M		
88.	State BK India (cash)	B	Interest			Closed	12/18/24	M		
89.	Wells Fargo Bank (cash)	C	Interest			Closed	12/30/24	L		
90.	Capital One Bank (cash)	C	Interest	L	T					
91.	UBS Bank USA (cash)	D	Interest	M	T					
92.	American Water Works Co Inc New (AWK)	B	Dividend	K	T					
93.	BP PLC Spon ADR (BP)	C	Dividend			Sold	12/17/24	K		
94.	California Water SVC Group (CWT)	B	Dividend	L	T					
95.	Essential Utilities Inc (WTRG)	A	Dividend	K	T					
96.	Marathon Pete Corp (MPC)	D	Dividend	N	T	Sold (part)	12/17/24	K		
97.	Middlesex Water Co (MSEX)	A	Dividend	K	T					
98.	Phillips 66 (PSX)	B	Dividend	L	T					
99.	Shell Plc Adr (SHEL)	D	Dividend	M	T					
100.	Dimensional International High Profitability ETF (DIHP)	B	Dividend			Sold	11/21/24	L		
101.	Dimenstional National Municipal Bond ETF (DFNM)	C	Dividend			Buy	01/08/24	L		
102.						Buy (add'l)	02/05/24	K		

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less
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2. Value Codes (See Columns C1 and D3)
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103.					Buy (add'l)	04/09/24	L		
104.					Sold	06/11/24	M		
105.					Buy (add'l)	07/24/24	L		
106.					Buy (add'l)	08/05/24	L		
107.					Buy (add'l)	08/16/24	M		
108.					Sold	11/21/24	M		
109. Dimensional ETF Tr US Targeted Value ETF (DFAT)	A	Dividend			Sold (part)	02/05/24	K		
110.					Sold	08/05/24	K		
111. Dimensional US Real Estate ETF (DFAR)		None			Sold	02/05/24	K		
112. Schwab U.S. Dividend Equity ETF (SCHD)	D	Dividend	M	T	Sold (part)	08/05/24	K		
113. DFA Municipal Bond Institutional (DFMPX)	B	Dividend	M	T	Buy	06/11/24	M		
114.					Buy (add'l)	12/16/24	J		
115.					Buy (add'l)	12/23/24	L		
116. DFA Two-Year Govt Inst (DFYGX)		None			Sold	01/08/24	L		
117. DFA Emerging Markets Social Core PTF (DFESX)	C	Dividend	M	T					
118. DFA Intl Social Core Equity Port (DSCLX)	D	Dividend	M	T					
119. DFA US Hi Relative Prof (DURPX)	D	Dividend	O	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	08/13/2025

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)	
120. DFA US Social Core Equity 2 (DFUEX)	D	Dividend	O	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		

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

Parenthetical numbers in Part VII are CUSIP numbers which, like ticker symbols, are standard asset identifiers. They contain no security-based information.

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.

Name of Person Reporting	Date of Report
Beetlestone, Wendy	08/13/2025

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/ 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. § 13106)

Committee on Financial Disclosure
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