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
Marston, Karen S.	U.S. District Court, Eastern District of Pennsylvania	06/09/2025
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		
U. S. Courthouse 601 Market St. 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.	Board Member	Horizons [redacted]
2.	Member	University of Pennsylvania Inn of Court
3.	Adjunct Professor	Drexel University
4.	Executor	Estate #1 (no reportable assets)
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.	2000	Moore & Van Allen, PLLC Profit Sharing Plan (reportable assets are listed in Part VII)
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	Drexel University (teaching income)	$5,200.00
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	[redacted]. (salary)
2.	2024	[redacted] (salary)
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.	[redacted]	Tuition	None
2.	NVE Bank	Mortgage on Business Property	N
3.			
4.			
5.			

Name of Person Reporting	Date of Report
Marston, Karen S.	06/09/2025

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. Bank of America Accounts (cash)	A	Interest	K	T					
3. Chase (cash)		None	K	T					
4. E*Trade (cash)	A	Interest	K	T					
5. Wells Fargo (cash)		None	K	T					
6. Series EE Savings Bonds (cash)	A	Interest	J	T					
7. John Hancock MVL Edge II Universal Ins., Managed Volatility Growth		None	K	T					
8. BBM Holdings, LLC	B	Distribution	M	U					
9. Rental Property, Ewing, NJ	G	Rent	O	W					
10. [redacted] (X)		None			Sold	11/30/24	P2		
11. [redacted]		None	P1	U	Buy	11/30/24	P1		
12. X Global Response LLC		None	M	U	Buy	11/30/24	M		
13. Account #1 (H)									
14. MSPBNA Preferred Savings (cash) (X) (Y)									
15. Nvidia Corp (NVDA)	A	Dividend	J	T	Buy	05/22/24	J		
16.					Buy (add'l)	05/31/24	J		
17. Univest Financial Corp Common Stock (UVSP)	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		

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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)	 (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	 (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (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. Invesco QQQ TR Unit Ser 1 (QQQ)	A	Dividend	L	T	Sold (part)	09/13/24	J		
19. SPDR S&P 500 ETF Trust (SPY)	A	Dividend	L	T	Sold (part)	03/28/24	K		
20.					Buy (add'l)	11/29/24	L		
21. Account #2 (H)									
22. American Funds Europacific Growth Fund (AEPGX)	A	Dividend	J	T					
23. NYLI Winslow Large Cap Growth Fund R1 (MLRRX) (was Mainstay MLAAX)	E	Dividend	L	T					
24. Account #3 (H)									
25. Vngrd Tr Rt 2040 INV (VFORX)		None	M	T	Buy (add'l)	01/03/24	J		
26.					Sold (part)	01/03/24	M		
27.					Buy (add'l)	04/02/24	J		
28.					Buy (add'l)	07/02/24	J		
29.					Buy (add'l)	10/02/24	J		
30. Vngrd Tin Sk Ix Adml (VTIAX)		None			Sold	01/03/24	L		
31. Vngrd 500 Index Adml (VFIAX) `		None	O	T	Buy (add'l)	01/03/24	N		
32.					Buy (add'l)	04/02/24	K		
33.					Buy (add'l)	07/02/24	J		
34.					Buy (add'l)	10/02/24	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
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35. Vngrd Sm Cp Idx Adml (VSMAX)		None			Sold	01/03/24	L		
36. Vngrd Em St Inv Adml (VEMAX)		None			Sold	01/03/24	K		
37. Account #4 (H)									
38. MSPBNA Preferred Savings (cash)	B	Interest	M	T					
39. Account #5 (H)									
40. Morgan Stanley Private Bank NA (cash)	C	Interest	N	T					
41. MSILF Treasury Port INST (MISXX) (cash eq.)	D	Dividend	P1	T	Buy	12/02/24	P1		
42.					Sold (part)	12/10/24	P1		
43.					Sold (part)	12/18/24	K		
44. Account #6 (H)									
45. Morgan Stanley Bank NA (cash)	A	Interest	K	T	Open	12/11/24	P1		
46. Avantis Emrging Mkt WQ (AVEM)		None	M	T	Buy	12/30/24	M		
47. Ishares Russell 1000 Value ETF (IWD)	B	Dividend			Buy	12/13/24	N		
48.					Sold	12/30/24	N		
49. Ishares Russell 1000 Growth ETF (IWF)	A	Dividend			Buy	12/13/24	N		
50.					Sold	12/30/24	N		
51. Ishares Core MSCI EAFE ETF (IEFA)	C	Dividend			Buy	12/13/24	N		

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52.					Sold	12/30/24	N		
53. Ishares Core MSCI Emerging (IEMG)	C	Dividend			Buy	12/13/24	M		
54.					Sold	12/30/24	M		
55. IShares Nat Mun BN ETF (MUB)		None	N	T	Buy	12/30/24	N		
56. Ishares S&P Mid Cap 400 G ETF (IJK)		None	L	T	Buy	12/30/24	L		
57. Ishares S&P Mid Cap 400 V ETF (IJJ)		None	K	T	Buy	12/30/24	K		
58. Ishares Core S&P 500 ETF (IVV)	A	Dividend			Buy	12/13/24	M		
59.					Sold	12/30/24	M		
60. IShares Russell Midcap Value ETF (IWS)	A	Dividend			Buy	12/13/24	K		
61.					Sold	12/30/24	K		
62. IShares Russell Midcap Growth ETF (IWP)	A	Dividend			Buy	12/13/24	L		
63.					Sold	12/30/24	L		
64. SPDR S&P 500 ETF TRUST (SPY)		None	M	T	Buy	12/30/24	M		
65. SPDR Nuveen Bloomberg Municipal (TFI)	B	Dividend			Buy	12/13/24	N		
66.					Sold	12/30/24	N		
67. Vanguard FTSE Developed MKTS (VEA)		None	N	T	Buy	12/30/24	N		
68. Vanguard Growth ETF (VUG)		None	N	T	Buy	12/30/24	N		

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69. Vanguard Value ETF Index (VTV)		None	N	T	Buy	12/30/24	N		
70. Account #7 (H)									
71. Vanguard 529 500 Index (VFINX)		None	M	T	Sold (part)	06/24/24	J		
72.					Sold (part)	11/12/24	J		
73.					Buy (add'l)	11/29/24	K		
74. Vanguard 529 Target Enrollment 2028/2029		None	L	T	Sold (part)	06/24/24	J		
75.					Sold (part)	11/12/24	J		
76.					Buy (add'l)	11/29/24	J		
77. Account #8 (H)									
78. Vanguard 529 500 Index (VFINX)		None	M	T	Buy (add'l)	02/12/24	L		
79.					Sold (part)	02/12/24	K		
80.					Sold (part)	06/24/24	J		
81.					Sold (part)	08/22/24	L		
82.					Buy (add'l)	08/22/24	L		
83.					Sold (part)	11/12/24	J		
84.					Buy (add'l)	11/29/24	K		
85. Vanguard 529 Target Enrollment 2028/2029		None			Buy	02/12/24	K		

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	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	
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86.					Sold	08/22/24	K		
87. Vanguard 529 Target Enrollment 2030/2031		None	L	T	Buy (add'l)	02/12/24	K		
88.					Sold (part)	02/12/24	L		
89.					Sold (part)	08/22/24	K		
90.					Buy (add'l)	08/22/24	L		
91.					Sold (part)	11/12/24	J		
92.					Buy (add'l)	11/29/24	J		
93. Vanguard 529 STAR Portfolio		None			Sold	02/12/24	K		
94. Account #9 (H)									
95. USAA Age-Based Option 14-15 Conservative Port		None	J	T	Sold (part)	06/24/24	J		
96. Account #10 (H)									
97. USAA Age Based Option 12-13: Moderately Conservative Portfolio		None	J	T	Sold (part)	06/24/24	J		
98. Account #11 (H)									
99. Intel Corp (INTC)	A	Dividend	J	T					
100. Univest Financial Corp Common Stock (UVSP)	A	Dividend	J	T					
101. Invesco QQQ TR Unit Ser 1 (QQQ)	A	Dividend	K	T	Buy (add'l)	12/06/24	K		
102. SPDR S&P 500 ETF TRUST (SPY)		None	K	T	Buy	12/06/24	K		

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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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103. Account #12 (H)									
104. Morgan Stanley (cash) (X) (Y)									
105. Intel Corp (INTC)	A	Dividend	J	T					
106. Univest Financial Corp (UVSP)	A	Dividend	J	T					
107. Walgreens Boot Alliance Inc (WBA)	A	Dividend			Sold	11/29/24	J		
108. Invesco QQQ TR Unit Ser 1 (QQQ)	A	Dividend	K	T	Buy (add'l)	12/06/24	K		
109. SPDR S&P 500 ETF (SPY)		None	K	T	Buy	12/06/24	K		

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
Marston, Karen S.	06/09/2025

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

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.

Account #3 is controlled and managed by the employer of an individual with assets subject to this report. The account holder is permitted to adjust percentages of investment for each position, but the timing of any transactions is within the exclusive purview of the manager. Despite request, specific transaction dates are not available to the filer. In the absence of more precise information, transactions are reported as of the second business day of the quarter in which they occurred.

Name of Person Reporting	Date of Report
Marston, Karen S.	06/09/2025

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/ Karen S. Marston

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
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