AO 10
Rev. 1/2019

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
Wolson, Joshua D.	Eastern District of Pennsylvania	05/05/2022
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**
United States District Judge -- Active Status	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2021 **to** 12/31/2021
7. Chambers or Office Address		
Room 3809 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.		
2.	Chair, Board of Directors	Historic Philadelphia, Inc.
3.	Member, Board of Directors	Breakthrough Bike Challenge, Inc.
4.	Trustee	Irrevocable Trust (no reportable assets)
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.			
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	Salary from Goldstein Law Partners LLC -- legal practice
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.	Federal Bar Association	Sept. 23-24	Miami, FL	National Lawyers Conference (speaking)	Transportaiton, meals, hotel
2.					
3.					
4.					
5.					

Name of Person Reporting	Date of Report
Wolson, Joshua D.	05/05/2022

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.	Navient, Inc.	Student loans	K
3.			
4.			
5.			

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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) 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)
1. E*Trade Bank cash account.	A	Interest	J	T					
2. Custodian Account (H)									
3. - Walt Disney Co	A	Dividend	J	T					
4. - Ameriprise Insured Money Market	A	Interest	J	T					
5. Ameriprise Insured Money Market	A	Interest	J	T					
6. Franklin Dynatech Advisor Class		None	K	T					
7. Franklin Pennsylvania Tax Free Income Advisor Class	A	Dividend	K	T					
8. Templeton Global Bond Advisor Class	B	Dividend	K	T					
9. IRA # 1 (H)									
10. - Ameriprise Insured Money Market	A	Interest	J	T					
11. - Franklin Income Advisor Class	D	Dividend	M	T					
12. - Franklin Utilities Advisor Class	C	Dividend	M	T					
13. - Franklin Intl Small Cap Advisor Class	B	Dividend			Sold	01/13/21	M		
14. - Franklin Growth Opportunities Advisor Class		None	M	T					
15. - Franklin Small/Mid-Cap Growth Advisor Class		None	M	T					
16. - Templeton Developing Markets Advisor Class	B	Dividend	M	T	Buy (add'l)	01/14/21	L		
17. - Templeton World Advisor Class	D	Dividend	M	T	Buy (add'l)	01/13/21	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
Wolson, Joshua D.	05/05/2022

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) 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. - Templeton Growth Advisor Class	B	Dividend	M	T					
19. IRA # 2 (H)									
20. - Ameriprise Insured Money Market	A	Interest	J	T					
21. - Franklin Small Cap Value Class A	A	Dividend	K	T					
22. - Franklin Small Cap Value Advisor Class	A	Dividend	J	T					
23. - Franklin Small/Mid-Cap Growth Advisory Class	A	Int./Div.	K	T					
24. IRA # 3 (H)									
25. - Ameriprise Insured Money Market	A	Int./Div.	J	T					
26. - Franklin Income Advisor Class	B	Dividend	J	T					
27. - Franklin Utilities Advisor Class	C	Dividend							
28. - Franklin Managed Income Advisor Class	A	Dividend	J	T					
29. - Franklin Growth Opportunities Advisor Class		None	J	T	Buy (add'l)	10/28/21	J		
30. Virginia 529 Plan Aggresive Growth Portfolio		None	N	T					
31. Virginia 529 Plan Aggressive Growth Portfolio		None	M	T					
32. Brokerage Acct # 1 (H)									
33. - AB Discovery Value Fund	A	Int./Div.	K	T					
34. - AB Discovery Growth Fund		None	K	T					

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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)
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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)
35. - AB Small Cap Core Portfolio	A	Int./Div.	K	T					
36. - Adobe Inc. common stock		None	J	T					
37. - Alphabet Class C capital stock		None	K	T					
38. - American Electric Power Co. common stock	A	Dividend	J	T					
39. - Apple common stock	A	Dividend	K	T					
40. - Autozone		None	J	T					
41. - Biogen		None			Sold	07/12/21	J	C	
42. - CDW Corp	A	Dividend			Sold	05/05/21	J	C	
43. - Costco Wholesale Systems	A	Dividend	J	T					
44. - Dollar General common stock	A	Dividend	J	T					
45. - Edwards Lifesciences		None			Sold	07/12/21	J	C	
46. - Meta Class A stock		None	K	T					
47. - Gilead Sciences	A	Dividend	J	T					
48. - Merck & Co common stock	A	Dividend	J	T					
49. - Microsoft Corp	A	Dividend	K	T					
50. - Nike	A	Dividend	J	T					
51. - Organon & Co.	A	Dividend	J	T					

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52. - Pfizer	A	Dividend	J	T					
53. - Proctor & Gamble	A	Dividend	J	T					
54. - Sun Communities	A	Dividend	J	T					
55. - T Mobile US common stock		None			Sold	05/05/21	J	C	
56. - Texas Instruments	A	Dividend	J	T					
57. - UnitedHealth Group	A	Dividend	J	T					
58. - Vertex Pharmaceuticals		None			Sold	05/05/21	J	A	
59. --Viatris Inc.		None			Sold	05/05/21	J	A	
60. - Visa Class A common stock	A	Dividend	J	T					
61. - Walt Disney Co.		None			Sold	11/22/21	J	B	
62. - Xilinx	A	Dividend			Sold	07/14/21	J	B	
63. - Zoetis	A	Dividend	J	T					
64. - Bernstein Tax-Managed International Portfolio	B	Int./Div.	M	T					
65. - AB International Strategic Equity Portfolio	C	Int./Div.	N	T	Buy (add'l)	04/19/21	J		
66. - AB Int'l Small Cap Portfolio	C	Int./Div.	L	T					
67. - Bernstein Emerging Markets Portfolio	A	Int./Div.	K	T	Buy (add'l)	04/19/21	J		
68. - AB Large Cap Growth Fund		None	K	T					

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69. - AB Value Fund	A	Int./Div.	K	T					
70. - AB Concentrated Growth Fund Adv Cl		None	J	T					
71. Exxon Mobil Common Stock	A	Dividend	J	T					
72.									
73.									
74.									

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

The trust listed in Part I is a [redacted] trust that holds a life insurance policy on the lives of my [redacted]. My [redacted] and I are beneficiaries.

Name of Person Reporting	Date of Report
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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/ Joshua D. Wolson

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