AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2022

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
Wolson, Joshua D.	Eastern District of Pennsylvania	05/02/2023
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**
United States District Judge -- Active Status	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2022 **to** 12/31/2022
7. Chambers or Office Address		
Room 12613 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.	Chair, Board of Directors	Historic Philadelphia, Inc.
2.	Member, Board of Directors	Breakthrough Bike Challenge, Inc.
3.	Trustee	Irrevocable Trust (no reportable assets)
4.	Adjunct Professor	Carey School of Law, University of Pennsylvania
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.	04/29/2022	Carey School of Law at Univ. of Pennsylvania, teaching income	$10,000.00
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.		
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.	Mortgage Bankers of Amierca	5/23/2022-5/24/2022	Miami, FL	Speaking at annual meeting	Transportation, hotel
2.	American Conference Institute	4/26/2022	New York, NY	Speaking at conference on patent law	Transportation
3.	NY Intellectual Property Association	3/25/2022-3/26/2022	New York, NY	Attend annual dinner	Transportation, hotel, meals
4.	American Conference Institute	9/21/2022-9/22/2022	Chicago, IL	Speaking at conference on patent law	Transportation, hotel

5.	Notre Dame Law School	11/3/2022-11/6/2022	South Bend, IN	Lecture to students	Transportation, hotel, meals, football tickets
6.	American Bar Association	11/11/2022	Washington, DC	Speaking at annual Labor and Employment Section conference	Transportation

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Wolson, Joshua D.	05/02/2023

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.	Navient, Inc.	Student loans	K
2.	[redacted]	Tuition Agreement	None
3.	[redacted]	Tuition Agreement	None
4.			
5.			

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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. E*Trade Bank cash account.	A	Interest	J	T					
2. Senate Federal Credit Union cash account (X)	A	Int./Div.	J	T					
3. AB Value Fund	A	Int./Div.	J	T					
4. Brokerage Acct # 1 (H)									
5. -Franklin Dynatech Advisor Class		None	K	T					
6. -Franklin Pennsylvania Tax Free Income Advisor Class	A	Dividend	K	T					
7. Brokerage Acct # 2 (H)									
8. - Adobe Inc. common stock		None	J	T					
9. - Alphabet Class C capital stock		None	K	T					
10. - American Electric Power Co. common stock	A	Dividend	J	T					
11. - Apple common stock	A	Dividend	K	T					
12. - Autozone		None	J	T					
13. - Costco Wholesale Systems	A	Dividend	J	T					
14. - Dollar General common stock	A	Dividend	J	T					
15. - Meta Platforms Class A stock		None	K	T					
16. - Gilead Sciences	A	Dividend	J	T					
17. - Merck & Co common stock	A	Dividend	J	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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Wolson, Joshua D.	05/02/2023

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)	
18. - Microsoft Corp	A	Dividend	K	T					
19. - Nike	A	Dividend	J	T					
20. - Organon & Co.	A	Dividend	J	T					
21. - Pfizer	A	Dividend	J	T					
22. - Proctor & Gamble	A	Dividend	J	T					
23. - Sun Communities	A	Dividend	J	T					
24. - Texas Instruments	A	Dividend	J	T					
25. - UnitedHealth Group	A	Dividend	J	T					
26. - Visa Class A common stock	A	Dividend	J	T					
27. - Zoetis	A	Dividend	J	T	Sold (part)	11/22/22	J	A	
28. Brokerage Acct # 3 (H)									
29. - AB Discovery Growth Fund		None	K	T	Sold (part)	03/08/22	J	A	
30. -Templeton Global Bond Advisor Class	B	Dividend	K	T					
31. - AB Large Cap Growth Fund		None	K	T					
32. - AB Concentrated Growth Fund Adv Cl	A	Dividend	L	T					
33. - AB Discovery Value Fund	A	Dividend	M	T					
34. - Franklin Income Advisor Class	D	Int./Div.	M	T	Buy	03/28/22	M		

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less
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C =$2,501 - $5,000
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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
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3. Value Method Codes (See Column C2)
Q =Appraisal
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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)	
35. - Franklin Utilities Advisor Class	C	Dividend	M	T	Buy	03/28/22	M		
36. - Franklin Strategic Income Advisor Class	D	Dividend	M	T	Buy	03/28/22	M		
37. Custodian Account (H)									
38. - Walt Disney Co					Sold	03/16/22	J	B	
39. - Ameriprise Insured Money Market (Y)									
40. IRA # 1 (H)									
41. - Ameriprise Insured Money Market	A	Interest	J	T					
42. -Franklin Income Advisor Class	D	Int./Div.	M	T					
43. -Franklin Utilities Advisor Class	C	Dividend	M	T					
44. - Franklin Growth Opportunities Advisor Class		None	M	T					
45. - Franklin Small/Mid-Cap Growth Advisory Class			L	T					
46. - Templeton Developing Markets Advisor Class	C	Dividend	M	T					
47. - Templeton Growth Advisor Class	C	Dividend	M	T					
48. - Templeton World Advisor Class	C	Dividend	M	T	Sold (part)	02/25/22	J	A	
49.					Sold (part)	05/26/22	J	A	
50.					Sold (part)	07/20/22	J	A	
51.					Sold (part)	09/07/22	J	A	

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
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52.					Sold (part)	09/22/22	J	A	
53.					Sold (part)	11/22/22	J	A	
54. IRA # 2 (H)									
55. - Franklin Small Cap Value Advisor Class	A	Dividend	J	T					
56. - Franklin Small/Mid-Cap Growth Advisor Class		None	K	T					
57. - Franklin Small Cap Value Class A	A	Dividend	K	T					
58. - Ameriprise Insured Money Market (Y)									
59. IRA # 3 (H)									
60. - Ameriprise Insured Money Market (Y)									
61. - Franklin Managed Income Advisor Class	A	Dividend	J	T					
62. - Franklin Growth Opportunities Advisor Class		None	K	T					
63. -Franklin Income Advisory Cl	A	Int./Div.	J	T					
64. Virginia 529 Plan 2027 Lifecycle Fund		None	N	T	Buy	03/25/22	N		
65.					Buy (add'l)	04/22/22	M		
66. Virginia 529 Plan 2030 Lifecycle Fund		None	M	T	Buy	03/25/22	J		
67.					Buy (add'l)	04/22/22	M		
68. Virginia 529 Plan Aggressive Growth Portfolio		None			Sold (part)	03/25/22	N	F	

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69.						Sold	04/22/22	M	F	
70.	Virginia 529 Plan Aggressive Growth Portfolio		None	J	T	Sold (part)	03/25/22	J	B	
71.						Sold	04/22/22	M	E	
72.						Buy	12/13/22	J		
73.	Brokerage Acct # 4 (H)									
74.	- AB Small Cap Core Portfolio					Sold	03/15/22	K	C	
75.	- AB International Strategic Equity Portfolio					Sold	03/15/22	N	D	
76.	- AB Int'l Small Cap Portfolio	B				Sold	03/15/22	L	C	
77.	- Bernstein Emerging Markets Portfolio					Sold	03/15/22	J	A	
78.	- Bernstein Tax-Mangaed International Portfolio					Sold	03/15/22	K	B	
79.	Exxon Mobil Common Stock	A	Dividend	J	T					
80.										
81.										
82.										

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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.

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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. § 13141 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. § 13106)

Committee on Financial Disclosure
Administrative Office of the United States Courts
Suite G-330
One Columbus Circle, N.E.
Washington, D.C. 20544