AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2023

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	05/15/2024
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	01/01/2023 **to** 12/31/2023
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.	04/29/2023	Carey School of Law at Univ. of Pennsylvania, teaching income	$12,500.00
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.	American Conference Institute	04/19/2023	New York City	Speak at conference	Train fare
2.	Harris Martin	11/29/2023-11/30/2023	Charleston, SC	Speak at conference	Airfare, hotel, meal
3.					
4.					
5.					

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Wolson, Joshua D.	05/15/2024

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.			

Name of Person Reporting	Date of Report
Wolson, Joshua D.	05/15/2024

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		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)	
1.	E*Trade Bank cash account.	A	Interest	J	T					
2.	Senate Federal Credit Union cash account (X)	A	Int./Div.	J	T					
3.	Brokerage Acct # 1 (H)									
4.	-AB Value Fund	A	Int./Div.	J	T	Sold (part)	07/14/23	K	C	
5.	- Franklin Strategic Income Advisor Class	D	Dividend	M	T					
6.	Brokerage Acct # 2 (H)									
7.	-Franklin Dynatech Advisor Class		None	K	T					
8.	-Franklin Pennsylvania Tax Free Income Advisor Class	A	Dividend	K	T					
9.	-Templeton Global Bond Advisor Class	B	Dividend	K	T					
10.	Brokerage Acct # 3 (H)									
11.	- Adobe Inc. common stock		None	J	T					
12.	- Alphabet Class C capital stock		None	K	T					
13.	- American Electric Power Co. common stock	A	Dividend	J	T					
14.	- Apple common stock	A	Dividend	K	T					
15.	- Autozone		None			Sold	04/03/23	J	B	
16.	- Costco Wholesale Systems	A	Dividend	J	T					
17.	- Dollar General common stock		None			Sold	04/24/23	J	C	

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.	05/15/2024

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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. - Meta Platforms Class A stock		None			Sold	04/03/23	J	B	
19. - Gilead Sciences	A	Dividend	J	T					
20. - Merck & Co common stock	A	Dividend	J	T					
21. - Microsoft Corp	A	Dividend	K	T					
22. - Nike		None			Sold	04/24/23	J	C	
23. - Organon & Co.	A	Dividend	J	T					
24. -Petroleo Brasileiro SA Petrobras ADR	D	Dividend	L	T	Buy	05/12/23	K		
25.					Buy (add'l)	07/24/23	K		
26. - Pfizer	A	Dividend	J	T					
27. - Proctor & Gamble	A	Dividend	J	T					
28. - Sun Communities	A	Dividend	J	T					
29. - Texas Instruments	A	Dividend	J	T					
30. - UnitedHealth Group		None			Sold	07/24/23	K	C	
31. - Visa Class A common stock		None			Sold	07/24/23	K	C	
32. - Zoetis	A	Dividend	J	T	Sold (part)	02/24/23	J	A	
33. - AB Discovery Growth Fund		None	K	T					
34. - AB Large Cap Growth Fund		None	K	T	Sold (part)	05/15/23	K	C	

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35. - AB Discovery Value Fund	A	Dividend	K	T					
36. - Franklin Income Advisor Class	D	Int./Div.	M	T					
37. - Franklin Utilities Advisor Class	C	Dividend	M	T					
38. AB Concentrated Growth Fund Adv Cl	A	Dividend	L	T	Sold (part)	08/17/23	J	A	
39. IRA # 1 (H)									
40. - Ameriprise Insured Money Market (Y)									
41. -Franklin Income Advisor Class	D	Int./Div.	M	T					
42. -Franklin Utilities Advisor Class	C	Dividend	M	T					
43. - Franklin Growth Opportunities Advisor Class		None	M	T					
44. - Franklin Small/Mid-Cap Growth Advisory Class		None	L	T					
45. - Templeton Developing Markets Advisor Class	C	Dividend	M	T					
46. - Templeton Growth Advisor Class	C	Dividend	M	T					
47. - Templeton World Advisor Class	C	Dividend	M	T					
48. IRA # 2 (H)									
49. - Franklin Small Cap Value Advisor Class	A	Dividend	J	T					
50. - Franklin Small/Mid-Cap Growth Advisor Class		None	K	T					
51. - Franklin Small Cap Value Class A	A	Dividend	K	T					

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52. IRA # 3 (H)									
53. - Franklin Managed Income Advisor Class	A	Dividend	J	T					
54. - Franklin Growth Opportunities Advisor Class		None	K	T					
55. -Franklin Income Advisory Cl	A	Int./Div.	J	T					
56. Virginia 529 Plan 2027 Lifecycle Fund		None	N	T	Buy (add'l)	05/31/23	N		
57. Virginia 529 Plan 2030 Lifecycle Fund		None	M	T	Buy (add'l)	05/30/23	K		
58.					Buy (add'l)	12/20/23	J		
59. Virginia 529 Aggressive Growth		None			Sold	05/30/23	K		
60. Exxon Mobil Common Stock	A	Dividend	J	T					
61.									
62.									
63.									

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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. § 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
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Washington, D.C. 20544