

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2016

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) Zouhary, Jack	2. Court or Organization District Court, Northern District of Ohio	3. Date of Report 5/8/2017
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time) District Judge / Active	5a. Report Type (check appropriate type) ☐ Nomination ☐ Date ☐ Initial ☒ Annual ☐ Final 5b. ☐ Amended Report	6. Reporting Period 01/01/2016 to 12/31/2016
7. Chambers or Office Address U.S. District Court 1716 Spielbusch Avenue Toledo, OH 43604		
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.		
3.		
4.		
5.		

II. AGREEMENTS. (Reporting individual only; see pp. 14-16 of filing instructions.)

☒ NONE (No reportable agreements.)

DATE

PARTIES AND TERMS

1.	
2.	
3.	

FINANCIAL DISCLOSURE REPORT

Page 2 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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. 2016	Self-employed arbitrator / mediator
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. University of Denver / Institute for the Advancement of the American Legal System	2/24 - 2/26/2016	Denver, CO	IAALS Fourth Civil Justice Reform Summit	Flight; hotel; meals; ground transportation
2. American College of Trial Lawyers	3/31 - 4/3/2016	Dallas, TX	ACTL National Trial Competition	Flight; hotel; meals; ground transportation
3. University of Denver / Institute for the Advancement of the American Legal System	4/21 - 4/22/2016	Denver, CO	IAALS Rebuilding Justice Dinner	Hotel; meals; ground transportation
4. American Bar Association	10/19 - 10/20/2016	Las Vegas, NV	ABA National Institute on Class Actions	Flight; hotel; meals; ground transportation; mileage; parking

FINANCIAL DISCLOSURE REPORT

Page 3 of 24

Name of Person Reporting	Date of Report
Zouhary, Jack	5/8/2017

5. _____

FINANCIAL DISCLOSURE REPORT

Page 4 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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.		
3.		
4.		
5.		

FINANCIAL DISCLOSURE REPORT

Page 5 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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		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)	(5) Identity of buyer/seller (if private transaction)

1. Trust #1									
2. - Boeing*	A	Dividend	K	T					
3. - DCT Industrial Trust*	A	Dividend	K	T					
4. - Deere & Co*	A	Dividend	K	T					
5. - General Electric*	C	Dividend	M	T					
6. - Intel*	B	Dividend	L	T					
7. - I Shares TR Russell Mid Cap Value*	A	Dividend	K	T					
8. - Motorola Solutions (MSI)	A	Dividend	K	T					
9. - PepsiCo*	A	Dividend	K	T					
10. - Pennsylvania Mutual Fund	A	Dividend	K	T					
11. - US Bancorp Delaware New*	A	Dividend	J	T					
12. - Abbott Labs*	A	Dividend	J	T					
13. - AT&T*	A	Dividend	J	T					
14. - Atmos Energy*	B	Dividend	M	T					
15. - BP PLC*	B	Dividend	K	T					
16. - Cardinal Health Inc Ohio *	A	Dividend	L	T					
17. - Coca Cola*	A	Dividend	K	T					

1. Income Gain Codes: (See Columns B1 and D4)	A = \$1,000 or less F = \$50,001 - \$100,000	B = \$1,001 - \$2,500 G = \$100,001 - \$1,000,000	C = \$2,501 - \$5,000 H1 = \$1,000,001 - \$5,000,000	D = \$5,001 - \$15,000 H2 = More than \$5,000,000	E = \$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	J = \$15,000 or less N = \$250,001 - \$500,000 P3 = \$25,000,001 - \$50,000,000	K = \$15,001 - \$50,000 O = \$500,001 - \$1,000,000	L = \$50,001 - \$100,000 P1 = \$1,000,001 - \$5,000,000 P4 = More than \$50,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
3. Value Method Codes (See Column C2)	Q = Appraisal U = Book Value	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	T = Cash Market	

FINANCIAL DISCLOSURE REPORT

Page 6 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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		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)	(5) Identity of buyer/seller (if private transaction)

18. - Eaton*	B	Dividend	L	T					
19. - Centurylink*	A	Dividend	J	T					
20. - HSBC Holding*	A	Dividend	J	T					
21. - JP Morgan Chase*	A	Dividend	J	T					
22. - Key Corp*	A	Dividend	M	T					
23. - McDonald's*	D	Dividend	O	T					
24. - Merck & Co*	B	Dividend	L	T					
25. - Royal Dutch Shell*	C	Dividend	L	T					
26. - Bristol-Myers Squibb*	A	Dividend	K	T					
27. - Conoco Philips*	A	Dividend	J	T					
28. - Colgate Palmolive*	A	Dividend	J	T					
29. - Conagra Foods*	A	Dividend	K	T					
30. - Du Pont E I DeNemours*	A	Dividend	K	T					
31. - HCP Inc. *	A	Dividend	J	T					
32. - Olin*	A	Dividend	J	T					
33. - Oracle*	A	Dividend	K	T					
34. - Walgreen*	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4)	A = \$1,000 or less F = \$50,001 - \$100,000	B = \$1,001 - \$2,500 G = \$100,001 - \$1,000,000	C = \$2,501 - \$5,000 H1 = \$1,000,001 - \$5,000,000	D = \$5,001 - \$15,000 H2 = More than \$5,000,000	E = \$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	J = \$15,000 or less N = \$250,001 - \$500,000 P3 = \$25,000,001 - \$50,000,000	K = \$15,001 - \$50,000 O = \$500,001 - \$1,000,000	L = \$50,001 - \$100,000 P1 = \$1,000,001 - \$5,000,000 P4 = More than \$50,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
3. Value Method Codes (See Column C2)	Q = Appraisal U = Book Value	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	T = Cash Market	

FINANCIAL DISCLOSURE REPORT

Page 7 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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		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)	(5) Identity of buyer/seller (if private transaction)
35. - Nuveen Ohio Mun (Fund)	B	Interest	K	T					
36. - Sprint Nextel*		None	J	T					
37. - Stryker*	A	Dividend	K	T					
38. - Windstream*	A	Dividend	J	T					
39. - Wisconsin Energy*	B	Dividend	L	T					
40. - 3 M*	B	Dividend	L	T					
41. - Eaton Vance Tax (Fund)	A	Dividend	J	T					
42. - Amgen*	A	Dividend	K	T					
43. - Johnson & Johnson*	B	Dividend	K	T					
44. - Microsoft*	B	Dividend	K	T					
45. - American Electric Power*	A	Dividend	K	T					
46. - Bob Evans Farms*	A	Dividend	L	T					
47. - Citigroup*	A	Dividend	J	T					
48. - Pfizer*	A	Dividend	K	T					
49. - Travelers*	A	Dividend	J	T					
50. - Teco Energy*	A	Dividend			Sold	07/01/16	J	A	
51. - Verizon Communications*	B	Dividend	K	T					

1. Income Gain Codes: (See Columns B1 and D4)	A = \$1,000 or less F = \$50,001 - \$100,000	B = \$1,001 - \$2,500 G = \$100,001 - \$1,000,000	C = \$2,501 - \$5,000 H1 = \$1,000,001 - \$5,000,000	D = \$5,001 - \$15,000 H2 = More than \$5,000,000	E = \$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	J = \$15,000 or less N = \$250,001 - \$500,000 P3 = \$25,000,001 - \$50,000,000	K = \$15,001 - \$50,000 O = \$500,001 - \$1,000,000	L = \$50,001 - \$100,000 P1 = \$1,000,001 - \$5,000,000 P4 = More than \$50,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
3. Value Method Codes (See Column C2)	Q = Appraisal U = Book Value	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	T = Cash Market	

FINANCIAL DISCLOSURE REPORT

Page 8 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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		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)	(5) Identity of buyer/seller (if private transaction)

52. - Deutsche Bank PFD Trust	A	Dividend	J	T					
53. - Waste Management*	A	Dividend	K	T					
54. - Merrill Lynch (Accounts)	A	Interest	O	T					
55. - Key Bank (Accounts)	A	Interest	K	T					
56. - Nationwide Bank (Accounts)	D	Interest	O	T					
57. - Butler County (Bond)	A	Interest	K	T					
58. - Elida Local School (Bond)	A	Interest	K	T					
59. - Butler County Transportation (Bond)	A	Interest	K	T					
60. - Clorox	A	Dividend	K	T					
61. - PPG	A	Dividend	K	T					
62. - Q Com	A	Dividend	K	T					
63. - VGT	A	Dividend	K	T					
64. - VWO	A	Dividend	J	T					
65. - Apple	A	Dividend	K	T					
66. - Kroger	A	Dividend	K	T					
67. - Proctor Gamble	A	Dividend	K	T					
68. - NBH	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4)	A = \$1,000 or less F = \$50,001 - \$100,000	B = \$1,001 - \$2,500 G = \$100,001 - \$1,000,000	C = \$2,501 - \$5,000 H1 = \$1,000,001 - \$5,000,000	D = \$5,001 - \$15,000 H2 = More than \$5,000,000	E = \$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	J = \$15,000 or less N = \$250,001 - \$500,000 P3 = \$25,000,001 - \$50,000,000	K = \$15,001 - \$50,000 O = \$500,001 - \$1,000,000	L = \$50,001 - \$100,000 P1 = \$1,000,001 - \$5,000,000 P4 = More than \$5,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
3. Value Method Codes (See Column C2)	Q = Appraisal U = Book Value	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	T = Cash Market	

FINANCIAL DISCLOSURE REPORT

Page 9 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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		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)	(5) Identity of buyer/seller (if private transaction)

69. - ATOIX	A	Interest	M	T					
70. - TGBAX	A	Interest	J	T					
71. - LDLFX	B	Dividend	L	T					
72. - Ohio State Higher Education Fac. (Bond)	A	Interest			Redeemed	05/02/16	J	A	
73. - Greene County Hosp. (Bond)	A	Interest	K	T					
74. - Am. Mun. Power OH Rev (Bond)	A	Interest			Redeemed	02/10/16	J		
75. - Frontier	A	Dividend	J	T					
76. - Banco Santander	A	Dividend			Sold	12/20/16	J		
77. - Diageo	A	Dividend	J	T					
78. - Kimberly Clark	A	Dividend	K	T					
79. - Monsanto	A	Dividend	J	T					
80. - Philip Morris	A	Dividend	J	T					
81. - Lord Abbett Floating Rate Fund	A	Dividend	K	T					
82. - Morgan Stanley Pfd.	B	Dividend			Redeemed	08/03/16	K	A	
83. - Gabelli Utilities Fund	B	Dividend	L	T					
84. - Barrick Gold	A	Dividend	J	T					
85. - Berkshire Hathaway		None	J	T					

1. Income Gain Codes: (See Columns B1 and D4)	A = \$1,000 or less F = \$50,001 - \$100,000	B = \$1,001 - \$2,500 G = \$100,001 - \$1,000,000	C = \$2,501 - \$5,000 H1 = \$1,000,001 - \$5,000,000	D = \$5,001 - \$15,000 H2 = More than \$5,000,000	E = \$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	J = \$15,000 or less N = \$250,001 - \$500,000 P3 = \$25,000,001 - \$50,000,000	K = \$15,001 - \$50,000 O = \$500,001 - \$1,000,000	L = \$50,001 - \$100,000 P1 = \$1,000,001 - \$5,000,000 P4 = More than \$50,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
3. Value Method Codes (See Column C2)	Q = Appraisal U = Book Value	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	T = Cash Market	

FINANCIAL DISCLOSURE REPORT

Page 10 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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		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)	(5) Identity of buyer/seller (if private transaction)
86. - Broadcom	A	Dividend	J	T					
87. - Cisco	A	Dividend	J	T					
88. - First Trust High Income	A	Dividend	J	T					
89. - VOYA Infrastructure	A	Dividend	J	T					
90. - Newmont Mining	A	Dividend	J	T					
91. - Paychex	A	Dividend	J	T					
92. - Petrobras	A	Dividend	J	T					
93. - Telefonica	A	Dividend	J	T					
94. - Teva	A	Dividend	J	T					
95. - Vodafone	A	Dividend	J	T					
96. - Doubleline Total Return	A	Dividend	J	T					
97. - TCW Total Return	A	Dividend	K	T					
98. - SPDR Nuveen S&P High	A	Dividend	J	T					
99. - Philips 66	A	Dividend	J	T					
100. - Aegon PFD	A	Dividend	J	T					
101. - SPDR Int (DWX)	A	Dividend	J	T					
102. - DJIA Mitt (MLPHV)		None	K	T					

1. Income Gain Codes: (See Columns B1 and D4)	A ~\$1,000 or less F ~\$50,001 - \$100,000	B ~\$1,001 - \$2,500 G ~\$100,001 - \$1,000,000	C ~\$2,501 - \$5,000 H1 ~\$1,000,001 - \$5,000,000	D ~\$5,001 - \$15,000 H2 ~More than \$5,000,000	E ~\$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	J ~\$15,000 or less N ~\$250,001 - \$500,000 P3 ~\$25,000,001 - \$50,000,000	K ~\$15,001 - \$50,000 O ~\$500,001 - \$1,000,000	L ~\$50,001 - \$100,000 P1 ~\$1,000,001 - \$5,000,000 P4 ~More than \$50,000,000	M ~\$100,001 - \$250,000 P2 ~\$5,000,001 - \$25,000,000	
3. Value Method Codes (See Column C2)	Q = Appraisal U = Book Value	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	T = Cash Market	

FINANCIAL DISCLOSURE REPORT

Page 11 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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		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)	(5) Identity of buyer/seller (if private transaction)

103. - Annaly Capital (NLY PRA)	B	Dividend	J	T					
104. - Apollo Investment (AIY)	A	Dividend	J	T					
105. - Protective Life Debenture (PL PRC)	A	Dividend	J	T					
106. - Abbvie (ABBV)	A	Dividend	J	T					
107. - Glaxo Smith	A	Dividend	J	T					
108. - Goldman Sachs MLP Energy	A	Dividend	J	T					
109. - Google		None	J	T					
110. - Halyard		None	J	T					
111. - Hamilton County (Bond)	A	Interest	L	T					
112. - Becton Dickinson	A	Dividend	J	T					
113. - Chemours	A	Dividend	J	T					
114. - IDV	A	Dividend	J	T					
115. - Fireye		None	J	T					
116. - Twitter		None			Sold	11/04/16	J		
117. - Lamb Weston	A	Dividend	J	T	Spinoff (from line 29)	11/09/16	J		
118. - Quality Care Properties		None	J	T	Spinoff (from line 31)	11/04/16	J		
119. - American Express	A	Dividend	J	T	Buy	01/27/16	J		

1. Income Gain Codes: (See Columns B1 and D4)	A = \$1,000 or less F = \$50,001 - \$100,000	B = \$1,001 - \$2,500 G = \$100,001 - \$1,000,000	C = \$2,501 - \$5,000 H1 = \$1,000,001 - \$5,000,000	D = \$5,001 - \$15,000 H2 = More than \$5,000,000	E = \$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	J = \$15,000 or less N = \$250,001 - \$500,000 P3 = \$25,000,001 - \$50,000,000	K = \$15,001 - \$50,000 O = \$500,001 - \$1,000,000	L = \$50,001 - \$100,000 P1 = \$1,000,001 - \$5,000,000 P4 = More than \$50,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
3. Value Method Codes (See Column C2)	Q = Appraisal U = Book Value	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	T = Cash Market	

FINANCIAL DISCLOSURE REPORT

Page 12 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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		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)	(5) Identity of buyer/seller (if private transaction)
120. - Gilead Science	A	Dividend	L	T	Buy	09/30/16	L		
121. IRA #1									
122. - Calamos (CVTRX)	A	Dividend	J	T					
123. - Thomas McDonald Money Market Fund (Wells Fargo Bank)	A	Interest	J	T					
124. - Thornburg International Value (TGVIX)	A	Dividend	K	T					
125. - Dividend Capital Property Fund	A	Dividend	K	T					
126. - Victory Portfolio (IPFIX)	A	Interest	J	T					
127. - Franklin Microcap (FVRMX)		None	J	T					
128. IRA #2									
129. - DFEOX	A	Dividend	K	T					
130. - DFITX	A	Dividend	K	T					
131. - DFREX	A	Dividend	K	T					
132. - DFALX	A	Dividend	J	T					
133. - Schwab (Account)	A	Interest	K	T					
134. - DFQTX	A	Dividend	K	T					
135. - DFIEX	A	Dividend	K	T					
136. IRA #3									

1. Income Gain Codes: (See Columns B1 and D4)	A = \$1,000 or less F = \$50,001 - \$100,000	B = \$1,001 - \$2,500 G = \$100,001 - \$1,000,000	C = \$2,501 - \$5,000 H1 = \$1,000,001 - \$5,000,000	D = \$5,001 - \$15,000 H2 = More than \$5,000,000	E = \$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	J = \$15,000 or less N = \$250,001 - \$500,000 P3 = \$25,000,001 - \$50,000,000	K = \$15,001 - \$50,000 O = \$500,001 - \$1,000,000	L = \$50,001 - \$100,000 P1 = \$1,000,001 - \$5,000,000 P4 = More than \$50,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
3. Value Method Codes (See Column C2)	Q = Appraisal U = Book Value	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	T = Cash Market	

FINANCIAL DISCLOSURE REPORT

Page 13 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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		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)	(5) Identity of buyer/seller (if private transaction)
137. - Morgan Stanley & Co.	D	Int./Div.	P1	T					
138. - Microsoft (MSFT)*	D	Dividend	M	T					
139. - I Shares S&P (PFF)	B	Dividend	K	T					
140. - Gabelli Utilities (GAUAX)	C	Dividend	K	T					
141. - First Trust High Income (FSD)	A	Dividend	J	T					
142. IRA #4									
143. - Blackrock Build America (BBN)	B	Dividend	K	T					
144. - Spider China ETF (GXC)	A	Dividend	J	T					
145. - Vanguard Total Market EFT (VTI)	A	Dividend	J	T					
146. - Dodge & Cox Income (DODIX)	A	Dividend	K	T					
147. - Vanguard High Dividend (VYM)	A	Dividend	K	T					
148. - First Trust High Income (FSD)	A	Dividend	J	T					
149. - Vanguard Money Market (Accounts)	A	Interest	L	T					
150. - Vanguard High Yield Corp (VWEHX)	B	Dividend	K	T					
151. - SPDR Int Div (DWX)	A	Dividend	J	T					
152. - Tortoise Energy (NDP)	B	Dividend	J	T					
153. - Pennsylvania Mutual (PENNX)	A	Dividend	K	T					

1. Income Gain Codes: (See Columns B1 and D4)	A = \$1,000 or less F = \$50,001 - \$100,000	B = \$1,001 - \$2,500 G = \$100,001 - \$1,000,000	C = \$2,501 - \$5,000 H1 = \$1,000,001 - \$5,000,000	D = \$5,001 - \$15,000 H2 = More than \$5,000,000	E = \$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	J = \$15,000 or less N = \$250,001 - \$500,000 P3 = \$25,000,001 - \$50,000,000	K = \$15,001 - \$50,000 O = \$500,001 - \$1,000,000	L = \$50,001 - \$100,000 P1 = \$1,000,001 - \$5,000,000 P4 = More than \$50,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
3. Value Method Codes (See Column C2)	Q = Appraisal U = Book Value	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	T = Cash Market	

FINANCIAL DISCLOSURE REPORT

Page 14 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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		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)	(5) Identity of buyer/seller (if private transaction)
154. - TCW Return (TGLMX)	A	Dividend	K	T					
155. - VBIRX	A	Dividend	K	T					
156. - Annaly Capital (NLY) & (NLY-PA)	A	Dividend	J	T					
157. - Apollo Investment (AIY)	A	Dividend	J	T					
158. - Verizon (VZ)	A	Dividend	J	T					
159. - Vodafone (VOD)	A	Dividend	K	T					
160. - Gateway (GATEX)	A	Dividend	K	T					
161. - 1 Shares Russell Midcap (IWS)	A	Dividend	J	T					
162. - British Petroleum (BP)	A	Dividend	J	T					
163. - Blackstone (BX)	B	Dividend	K	T					
164. - GSMLP Energy (GER)	A	Dividend	J	T					
165. - JP Morgan Equity (HLIEX)	B	Dividend	L	T					
166. - Templeton Global Bond (TGBAX)	A	Dividend	J	T					
167. - Henderson European Focus (HFEAX)		None	K	T					
168. - Gabelli Utilities Fund (GAUIX)	C	Dividend	K	T					
169. - VWO	A	Dividend	K	T					
170. - VGK	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4)	A = \$1,000 or less F = \$50,001 - \$100,000	B = \$1,001 - \$2,500 G = \$100,001 - \$1,000,000	C = \$2,501 - \$5,000 H1 = \$1,000,001 - \$5,000,000	D = \$5,001 - \$15,000 H2 = More than \$5,000,000	E = \$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	J = \$15,000 or less N = \$250,001 - \$500,000 P3 = \$25,000,001 - \$50,000,000	K = \$15,001 - \$50,000 O = \$500,001 - \$1,000,000	L = \$50,001 - \$100,000 P1 = \$1,000,001 - \$5,000,000 P4 = More than \$5,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
3. Value Method Codes (See Column C2)	Q = Appraisal U = Book Value	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	T = Cash Market	

FINANCIAL DISCLOSURE REPORT

Page 15 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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		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)	(5) Identity of buyer/seller (if private transaction)
171. - IDV	A	Dividend	J	T					
172. - CVX	A	Dividend	K	T					
173. - PJT		None			Sold	07/14/16	J	A	
174. - EWZ	A	Dividend	J	T					
175. - Oppenheimer International (OIBAX)	A	Dividend	J	T					
176. - Growth Fund of America (GFAFX)	A	Dividend	J	T					
177. - DFE	A	Dividend	J	T	Buy	01/25/16	J		
178. - DXJ	A	Dividend	J	T	Buy	02/12/16	J		
179. - Nationwide (Accounts)	A	Interest	L	T	Buy	03/04/16	L		
180. IRA #5									
181. - Tortoise Energy (NDP)	B	Dividend	K	T					
182. - VOYA Infrastructure	B	Dividend	K	T					
183. - Vanguard Money Market (Accounts)	A	Interest	K	T					
184. - Apollo Investment (AIY)	A	Dividend	J	T					
185. - Ares Capital (ARCC)	B	Dividend	K	T					
186. - OXY	A	Dividend	J	T					
187. - CRC	A	Dividend	J	T					

1. Income Gain Codes:	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
(See Columns B1 and D4)	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	J = \$15,000 or less	K = \$15,001 - \$50,000	L = \$50,001 - \$100,000	M = \$100,001 - \$250,000	
(See Columns C1 and D3)	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	Q = Appraisal	R = Cost (Real Estate Only)	S = Assessment	T = Cash Market	
(See Column C2)	U = Book Value	V = Other	W = Estimated		

FINANCIAL DISCLOSURE REPORT

Page 16 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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		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)	(5) Identity of buyer/seller (if private transaction)
188. - Medtronics	A	Dividend	J	T	Buy	12/30/16	J		
189. John Hancock Venture	D	Dividend	M	T					
190. Reliastar Whole Life (Insurance)	A	Interest	K	T					
191. US Savings Bonds	B	Interest			Redeemed	11/15/16	L	E	
192. Citigroup (C)*	A	Dividend	J	T					
193. Coca Cola European (CCE)*	A	Dividend	K	T					
194. Walt Disney Company (DIS)*	A	Dividend	K	T					
195. FFD Financial (FFDF)*	A	Dividend	K	T					
196. Motorola Solutions (MSI)	A	Dividend	J	T					
197. Occidental Petroleum (OXY)*	B	Dividend	K	T					
198. RPM International (RPM)*	A	Dividend	J	T					
199. Old National Bank (ONB)	A	Dividend	J	T					
200. US Bancorp (USB)*	A	Dividend	J	T					
201. Huntington*	A	Dividend	J	T					
202. Orbital (OBTEF)*		None			Sold	12/22/16	J		
203. Merrill Lynch CMA Funds (cash)	B	Interest	M	T					
204. Amgen (AMGN)*		None	K	T					

1. Income Gain Codes: (See Columns B1 and D4)	A ~\$1,000 or less F ~\$50,001 - \$100,000	B ~\$1,001 - \$2,500 G ~\$100,001 - \$1,000,000	C ~\$2,501 - \$5,000 H1 ~\$1,000,001 - \$5,000,000	D ~\$5,001 - \$15,000 H2 ~More than \$5,000,000	E ~\$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	J ~\$15,000 or less N ~\$250,001 - \$500,000 P3 ~\$25,000,001 - \$50,000,000	K ~\$15,001 - \$50,000 O ~\$500,001 - \$1,000,000	L ~\$50,001 - \$100,000 P1 ~\$1,000,001 - \$5,000,000 P4 ~More than \$50,000,000	M ~\$100,001 - \$250,000 P2 ~\$5,000,001 - \$25,000,000	
3. Value Method Codes (See Column C2)	Q = Appraisal U = Book Value	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	T = Cash Market	

FINANCIAL DISCLOSURE REPORT

Page 17 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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		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)	(5) Identity of buyer/seller (if private transaction)
205. Applied Material (AMAT)*	A	Dividend	K	T					
206. Ares Capital (ARCC)*	B	Dividend	J	T					
207. AT&T (T)*	A	Dividend	K	T					
208. Bristol-Myers Squibb (BMY)*	A	Dividend	K	T					
209. Coca Cola (KO)*	B	Dividend	K	T					
210. Conagra Foods (CAG)*	A	Dividend	K	T					
211. Eli Lilly (LLY)*	A	Dividend	K	T					
212. Intel (INTL)*	A	Dividend	K	T					
213. KeyCorp (KEY)*	A	Dividend	J	T					
214. Marathon Oil (MRO)*	A	Dividend	J	T					
215. Marathon Petroleum (MPC)	A	Dividend	J	T					
216. Sony (SNE)*	A	Dividend	J	T					
217. Verizon Communications (VZ)*	A	Dividend	J	T					
218. Zimmer Holdings (ZMH)*		None	J	T					
219. Blackrock Mun Intermediate Fund (MUI)	A	Interest	J	T					
220. CBS (CBSA)*	A	Dividend	J	T					
221. Goldman Sachs (GSMA)		None	K	T					

1. Income Gain Codes:	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
(See Columns B1 and D4)	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	J = \$15,000 or less	K = \$15,001 - \$50,000	L = \$50,001 - \$100,000	M = \$100,001 - \$250,000	
(See Columns C1 and D3)	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	
3. Value Method Codes	P3 = \$25,000,001 - \$50,000,000		P4 = More than \$50,000,000		
(See Column C2)	Q = Appraisal	R = Cost (Real Estate Only)	S = Assessment	T = Cash Market	
	U = Book Value	V = Other	W = Estimated		

FINANCIAL DISCLOSURE REPORT

Page 18 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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		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)	(5) Identity of buyer/seller (if private transaction)

222. Loomis Sayles (NEFZX)	A	Interest	K	T					
223. Merck (MRK)*	A	Dividend	J	T					
224. Bank of America (BAC)	A	Dividend	J	T					
225. VIG	A	Dividend			Sold	12/30/16	J		
226. Legg Mason Municipal High Fund (LMHIX)	A	Dividend	K	T					
227. Templeton Global Bond (TGBAX)	A	Dividend	J	T					
228. Frontier (FTR)	A	Dividend	J	T					
229. Pfizer (PFE)	A	Dividend	K	T					
230. Key Bank (Accounts)	B	Interest	M	T					
231. SB Financial Group	A	Dividend	J	T					
232. California Resources (CRC)	A	Dividend			Sold	12/22/16	J	A	
233. DTE Energy *	A	Dividend	K	T					
234. Cedar Fair (FUN)*	D	Dividend	L	T					
235. Nationwide Bank (Accounts)	C	Interest	O	T					
236. Butler County (Bond)	C	Interest	L	T					
237. Henderson International (HFOAX) Fund	A	Dividend	K	T					
238. IXJ	A	Dividend	L	T					

1. Income Gain Codes:	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
(See Columns B1 and D4)	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	J = \$15,000 or less	K = \$15,001 - \$50,000	L = \$50,001 - \$100,000	M = \$100,001 - \$250,000	
(See Columns C1 and D3)	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	
3. Value Method Codes	P3 = \$25,000,001 - \$50,000,000	R = Cost (Real Estate Only)	P4 = More than \$50,000,000	S = Assessment	T = Cash Market
(See Column C2)	Q = Appraisal	V = Other	W = Estimated		
	U = Book Value				

FINANCIAL DISCLOSURE REPORT

Page 19 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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		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)	(5) Identity of buyer/seller (if private transaction)

239. VGT	A	Dividend	K	T					
240. VEU	A	Dividend	J	T					
241. Vanguard (Accounts), previously VOHXX	A	Dividend	K	T					
242. VOHIX	C	Interest	L	T					
243. DFA US Core Equity (DFQTX)	C	Dividend	N	T					
244. DFA International Core (DFIEX)	B	Dividend	L	T					
245. DFA Emerging (DFCEX)	B	Dividend	K	T					
246. Greene County Ohio Hos. (Bonds)	B	Interest	L	T					
247. ATOIX	B	Dividend	M	T					
248. XLP	A	Dividend	K	T					
249. Dexcom		None	J	T					
250. VFSTX	A	Dividend	J	T					
251. Cisco (CISCO)	A	Dividend	K	T					
252. Energy Sector Spdr. (XLE)	A	Dividend	J	T					
253. Kimberly Clark (KMB)	A	Dividend	K	T					
254. Kroger (KR)	A	Dividend	K	T					
255. Monsanto (MON)	A	Dividend	L	T					

1. Income Gain Codes: (See Columns B1 and D4)	A = \$1,000 or less F = \$50,001 - \$100,000	B = \$1,001 - \$2,500 G = \$100,001 - \$1,000,000	C = \$2,501 - \$5,000 H1 = \$1,000,001 - \$5,000,000	D = \$5,001 - \$15,000 H2 = More than \$5,000,000	E = \$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	J = \$15,000 or less N = \$250,001 - \$500,000 P3 = \$25,000,001 - \$50,000,000	K = \$15,001 - \$50,000 O = \$500,001 - \$1,000,000	L = \$50,001 - \$100,000 P1 = \$1,000,001 - \$5,000,000 P4 = More than \$5,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
3. Value Method Codes (See Column C2)	Q = Appraisal U = Book Value	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	T = Cash Market	

FINANCIAL DISCLOSURE REPORT

Page 20 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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		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)	(5) Identity of buyer/seller (if private transaction)

256. Petroleo Brasileiro (PBR)	A	Dividend			Sold	12/01/16	J		
257. Qualcomm (QCOM)	A	Dividend	K	T					
258. Exelon (EXC)	A	Dividend	J	T					
259. Tortoise MLP Fund (NTG)	A	Dividend	K	T					
260. Abbott (ABT)	A	Dividend	J	T					
261. Community Trust Bank (CTBI)	A	Dividend	J	T					
262. Newmont Mining (NEM)	A	Dividend	J	T					
263. VOYA Infrastructure (IDE)	A	Dividend	J	T					
264. Morgan Stanley PFD (MSK)	C	Dividend			Redeemed	08/03/16	K	A	
265. Proctor Gamble (PG)	B	Dividend	K	T					
266. Statoil (STO)	A	Dividend	J	T					
267. Teva (TEVA)	A	Dividend	J	T					
268. Transocean (RIG)	A	Dividend			Sold	11/10/16	K		
269. First Trust (FSD)	A	Dividend	J	T					
270. Abbvie (ABBV)	A	Dividend	J	T					
271. Apple (AAPL)	A	Dividend	K	T					
272. Apache (APA)	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4)	A = \$1,000 or less F = \$50,001 - \$100,000	B = \$1,001 - \$2,500 G = \$100,001 - \$1,000,000	C = \$2,501 - \$5,000 H1 = \$1,000,001 - \$5,000,000	D = \$5,001 - \$15,000 H2 = More than \$5,000,000	E = \$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	J = \$15,000 or less N = \$250,001 - \$500,000 P3 = \$25,000,001 - \$50,000,000	K = \$15,001 - \$50,000 O = \$500,001 - \$1,000,000	L = \$50,001 - \$100,000 P1 = \$1,000,001 - \$5,000,000 P4 = More than \$5,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
3. Value Method Codes (See Column C2)	Q = Appraisal U = Book Value	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	T = Cash Market	

FINANCIAL DISCLOSURE REPORT

Page 21 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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		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)	(5) Identity of buyer/seller (if private transaction)
273. Citrix (CTXS)		None	K	T					
274. Rio Tinto (RIO)	A	Dividend	J	T					
275. Suncor (SU)	A	Dividend	K	T					
276. Windstream (WIN)	B	Dividend	J	T					
277. Vanguard High Dividend (VYM)	A	Dividend	J	T					
278. Halyard (HYH)		None	J	T					
279. Chicago Bridge & Iron (CBI)	A	Dividend			Sold	11/22/16	J		
280. Dorman (DORM)		None	J	T					
281. Amazon (AMZN)		None	K	T					
282. EBay (EBAY)		None	J	T					
283. Philip Morris (PM)	A	Dividend	K	T					
284. Zoetis (ZTS)	A	Dividend	J	T					
285. Vanguard Total Int. (VXUS)	A	Dividend	J	T					
286. I Share Japan (EWJ)	A	Dividend	J	T					
287. Power Shares Exchange (BKLN)	A	Dividend	J	T					
288. Walmart	A	Dividend	J	T					
289. Prudential Financial (PRU)	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4)	A = \$1,000 or less F = \$50,001 - \$100,000	B = \$1,001 - \$2,500 G = \$100,001 - \$1,000,000	C = \$2,501 - \$5,000 H1 = \$1,000,001 - \$5,000,000	D = \$5,001 - \$15,000 H2 = More than \$5,000,000	E = \$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	J = \$15,000 or less N = \$250,001 - \$500,000 P3 = \$25,000,001 - \$50,000,000	K = \$15,001 - \$50,000 O = \$500,001 - \$1,000,000	L = \$50,001 - \$100,000 P1 = \$1,000,001 - \$5,000,000 P4 = More than \$5,000,000	M = \$100,001 - \$250,000 P2 = \$5,000,001 - \$25,000,000	
3. Value Method Codes (See Column C2)	Q = Appraisal U = Book Value	R = Cost (Real Estate Only) V = Other	S = Assessment W = Estimated	T = Cash Market	

FINANCIAL DISCLOSURE REPORT

Page 22 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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		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)	(5) Identity of buyer/seller (if private transaction)
290. Market Oil Services (OIH)	A	Dividend	J	T					
291. Marathon Oil (MRO)	A	Dividend	J	T					
292. Baxter (BAX)	A	Dividend	J	T					
293. Baxalta (BXLTL)	A	Dividend			Sold	05/16/16	J	A	
294. PayPal		None	J	T					
295. UNITI Group, formerly known as Communication Sales (CSAL)	A	Dividend	J	T					
296. Synchrony Bank (Accounts)	A	Interest	M	T					
297. Hamilton County (Bond)	A	Interest	K	T					
298. Dividend Capital Total Realty Trust	B	Dividend	J	T					
299. Lamb Weston	A	Dividend	J	T	Spinoff (from line 210)	11/09/16	J		
300. Market Vector Short (SHYD)	A	Interest	J	T	Buy	11/18/16	J		

1. Income Gain Codes: (See Columns B1 and D4)	A –\$1,000 or less F –\$50,001 - \$100,000	B –\$1,001 - \$2,500 G –\$100,001 - \$1,000,000	C –\$2,501 - \$5,000 H1 –\$1,000,001 - \$5,000,000	D –\$5,001 - \$15,000 H2 –More than \$5,000,000	E –\$15,001 - \$50,000
2. Value Codes (See Columns C1 and D3)	J –\$15,000 or less N –\$250,001 - \$500,000 P3 –\$25,000,001 - \$50,000,000	K –\$15,001 - \$50,000 O –\$500,001 - \$1,000,000	L –\$50,001 - \$100,000 P1 –\$1,000,001 - \$5,000,000 P4 –More than \$50,000,000	M –\$100,001 - \$250,000 P2 –\$5,000,001 - \$25,000,000	
3. Value Method Codes (See Column C2)	Q –Appraisal U –Book Value	R –Cost (Real Estate Only) V –Other	S –Assessment W –Estimated	T –Cash Market	

FINANCIAL DISCLOSURE REPORT

Page 23 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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

Names with asterisks are common stocks and ETFs.

Trust #1 (Lines 1-120) contains Aggregate Ownership Arrangements in which my spouse is a trustee of family trusts.

Transfers from IRA #1 to IRA #4

2015 FDR Line 125

Transferred to IRA #4 (now Line 175)

Oppenheimer International (OIBAX)

2015 FDR Line 127

Transferred to IRA #4 (now Line 176)

Growth Fund of America (GFAFX)

Additions to 2015 Financial Disclosure Report

Line 117 / Lamb Weston

Spin-off from Line 29 / Conagra Foods

Line 118 / Quality Care Properties

Spin-off from Line 31 / HCP Inc.

Lines 119-120

Acquisitions to Trust #1

Lines 177-179

Acquisitions to Trust #4

Line 188

Acquisition to Trust #5

Line 298

Dividend Capital Total Realty Trust

Transfer from Trust #1 (distributed in 2015 with a 1/5 distribution to spouse)

Line 299 / Lamb Weston

Spin-off from Line 210 / Conagra Foods (CAG)

Line 300

Market Vector Short (SHYD)

Acquisition made jointly or by spouse

FINANCIAL DISCLOSURE REPORT

Page 24 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

5/8/2017

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/ Jack Zouhary

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