

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2014

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 04/29/2015
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 01/01/2014 to 12/31/2014
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

04/29/2015

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.)*

<u>DATE</u>	<u>SOURCE AND TYPE</u>	<u>INCOME</u> (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.)*

<u>DATE</u>	<u>SOURCE AND TYPE</u>
1. 2014	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.)*

<u>SOURCE</u>	<u>DATES</u>	<u>LOCATION</u>	<u>PURPOSE</u>	<u>ITEMS PAID OR PROVIDED</u>
1. University of Denver / Institute for the Advancement of the American Legal System	2/26/2014	Denver, CO	IAALS / ACTL Task Force on Discovery / Interview	Flight; transportation; meals; mileage; parking
2. University of Denver / Institute for the Advancement of the American Legal System	7/9 - 7/11/2014	Denver, CO	IAALS / ACTL Task Force on Discovery and Civil Justice	Flight; hotel; transportation; meals; mileage; parking
3. George Mason University Foundation	10/5 - 10/8/2014	Arlington, VA	Antitrust Law & Economics Institute for Judges	Flight; hotel; transportation; meals; mileage; parking
4.				

FINANCIAL DISCLOSURE REPORT

Page 3 of 24

Name of Person Reporting	Date of Report
Zouhary, Jack	04/29/2015

5. _____

FINANCIAL DISCLOSURE REPORT

Page 4 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

04/29/2015

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

04/29/2015

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 I (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. DTE Energy*	A	Dividend	J	T					
2. Trust #1	G	Int./Div.	P2	T					
3. - Boeing*									
4. - DCT Industrial Trust*									
5. - Deere & Co*									
6. - General Electric*									
7. - Intel*									
8. - 1 Shares TR Russell Mid Cap Value*									
9. - Motorola Solutions (MSI)									
10. - PepsiCo*									
11. - Pennsylvania Mutual Fund									
12. - US Bancorp Delaware New*									
13. - Abbott Labs*									
14. - AT&T*									
15. - Atmos Energy*									
16. - BP PLC*									
17. - Cardinal Health Inc Ohio *									

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

04/29/2015

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. - Coca Cola*									
19. - Eaton*									
20. - Centurylink*									
21. - HSBC Holding*									
22. - JP Morgan Chase*									
23. - Key Corp*									
24. - McDonald's*									
25. - Merck & Co*									
26. - Royal Dutch Shell*									
27. - Bristol-Myers Squibb*									
28. - Conoco Philips*									
29. - Colgate Palmolive*									
30. - Conagra Foods*									
31. - Du Pont E I DeNemours*									
32. - HCP Inc. *									
33. - Olin*									
34. - Oracle*									

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 7 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

04/29/2015

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. - Walgreen*									
36. - Nuveen Ohio Mun (Fund)									
37. - Sprint Nextel*									
38. - Stryker*									
39. - Windstream*									
40. - Wisconsin Energy*									
41. - 3 M*									
42. - Eaton Vance Tax (Fund)									
43. - Amgen*									
44. - Johnson & Johnson*									
45. - Microsoft*									
46. - American Electric Power*									
47. - Bob Evans Farms*									
48. - Citigroup*									
49. - Pfizer*									
50. - Travelers*									
51. - Teco Energy*									

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 8 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

04/29/2015

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. - Verizon Communications*									
53. - Dividend Capital Total Realty Trust									
54. - Deutsche Bank PFD Trust									
55. - Waste Management*									
56. - Real Estate Property No. 1 (Darke County, Ohio)									
57. - Merrill Lynch (Accounts)									
58. - Key Bank (Accounts)									
59. - Nationwide Bank (Accounts)									
60. - Wadsworth School Improvement (Bond)									
61. - Marysville School District (Bond)									
62. - Butler County (Bond)									
63. - Elida Local School (Bond)									
64. - Butler County Transportation (Bond)									
65. - Clorox									
66. - PPG									
67. - Q Com									
68. - VGT									

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

04/29/2015

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. - VWO									
70. - Apple									
71. - Kroger									
72. - Proctor Gamble									
73. - Carefusion									
74. - NBH									
75. - ATOIX									
76. - TGBAX									
77. - LDLFX									
78. - Montgomery County Ohio Rev (Bond)					Redeemed	11/17/14	K		
79. - Ohio State Higher Education Fac. (Bond)									
80. - Greene County Hosp. (Bond)									
81. - Am. Mun. Power OH Rev (Bond)									
82. - Frontier									
83. - Banco Santander									
84. - Diageo									
85. - Kimberly Clark									

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

04/29/2015

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. - Monsanto									
87. - Philip Morris									
88. - Blackrock Build America Bond Fund					Distributed	12/17/14	K		
89. - Lord Abbett Floating Rate Fund									
90. - Morgan Stanley Pfd.									
91. - Gabelli Utilities Fund									
92. - Barrick Gold									
93. - Berkshire Hathaway									
94. - Broadcom									
95. - Cisco									
96. - First Trust High Income									
97. - ING Infrastructure nka VOYA Infrastructure									
98. - Newmont Mining									
99. - Paychex									
100. - Petrobras									
101. - Telefonica									
102. - Teva									

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

04/29/2015

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. - Vodafone									
104. - Doubleline Total Return									
105. - TCW Total Return									
106. - SPDR Nuveen S&P High									
107. - JP Morgan PFD									
108. - Philips 66									
109. - Aegon PFD									
110. - SPDR Int (DWX)									
111. - DJIA Mitt (MLPHV)									
112. - Annaly Capital (NLY PRA)									
113. - Apollo Investment (AIY)					Distributed	12/11/14	K		
114. - Protective Life Debenture (PL PRC)									
115. - Tortoise Energy (NDP)					Sold	12/29/14	J		
116. - Abbvie (ABBV)									
117. - Glaxo Smith					Buy	12/15/14	J		
118. - Goldman Sachs MLP Energy					Buy	11/14/14	J		
119. - Google					Buy	10/17/14	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

04/29/2015

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. - Halyard					Spinoff (from line 85)	11/06/14	J		
121. IRA #1	D	Int./Div.	N	T					
122. - Calamos (CVTRX)									
123. - Munder Mid Cap (MGOAX)					Sold	10/30/14	K		
124. - Oppenheimer International (OIBAX)									
125. - Thomas McDonald Money Market Fund									
126. - Growth Fund of America (GFAFX)									
127. - Henderson European Focus (HFEAX)									
128. - Thornburg International Value (TGVIX)									
129. - Van Kampen Growth & Income (ACGMX)					Sold	01/31/14	K		
130. - Dividend Capital Total Realty Trust									
131. - Gabelli Utilities Fund (GAUIX)									
132. - Victory Portfolio (IPFIX)									
133. - Franklin Microcap (FVRMX)									
134. IRA #2	E	Int./Div.	N	T					
135. - DFEOX									
136. - DFITX									

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

04/29/2015

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. - DFREX									
138. - DFALX									
139. - DFSHX									
140. - Schwab (Account)									
141. - DFQTX									
142. - DFIEX									
143. IRA #3	E	Int./Div.	P1	T					
144. - Morgan Stanley & Co.									
145. - Microsoft (MSFT)*									
146. - I Shares S&P (PFF)									
147. - Gabelli Utilities (GAUAX)									
148. - First Trust High Income (FSD)									
149. IRA #4	D	Dividend	O	T					
150. - Blackrock Build America (BBN)									
151. - Spider China ETF (GXC)									
152. - Vanguard Total Market EFT (VTI)									
153. - Dodge & Cox Income (DODIX)									

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

04/29/2015

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. - Vanguard High Dividend (VYM)									
155. - First Trust High Income (FSD)									
156. - Vanguard Money Market (VMMXX)									
157. - Vanguard High Yield Corp (VWEHX)									
158. - SPDR Int Div (DWX)									
159. - Tortoise Energy (NDP)									
160. - Natural Resource (NRP)									
161. - Pennsylvania Mutual (PENNX)									
162. - TCW Return (TGLMX)									
163. - VBIRX									
164. - Annaly Capital (NLY)									
165. - Apollo Investment (AIY)									
166. - Verizon (VZ)									
167. - Vodafone (VOD)									
168. - Gateway (GATEX)									
169. - I Shares Russell Midcap (IWS)									
170. - British Petroleum (BP)					Buy	10/09/14	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 \$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

04/29/2015

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. - Blackstone (BX)					Buy	10/01/14	J		
172. - GSMLP Energy (GER)					Buy	11/14/14	J		
173. - JP Morgan Equity (HLIEX)					Buy	01/31/14	K		
174. - Templeton Global Bond (TGBAX)					Buy	02/19/14	J		
175. IRA #5	A	Dividend	M	T					
176. - Tortoise Energy (NDP)									
177. - ING Infrastructure (IDE) nka VOYA Infrastructure									
178. - Vanguard Money Market (VMMXX)									
179. - Apollo Investment (AIY)									
180. - Ares Capital (ARCC)					Buy	09/25/14	J		
181. John Hancock Venture	D	Dividend	M	T					
182. Reliastar Whole Life (Insurance)	A	Interest	J	T					
183. US Savings Bonds	B	Interest	K	T					
184. Citigroup (C)*	B	Dividend	K	T					
185. Coca Cola Enterprises (CCE)*	A	Dividend	J	T					
186. Walt Disney Company (DIS)*	A	Dividend	J	T					
187. FFD Financial (FFDF)*	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

04/29/2015

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. Motorola Solutions (MSI)	A	Dividend	J	T					
189. Occidental Petroleum (OXY)*	B	Dividend	K	T					
190. RPM International (RPM)*	A	Dividend	J	T					
191. Tower Financial (TOFC)* nka Old National Bank (ONB)		None	J	T					
192. US Bancorp (USB)*	A	Dividend	J	T					
193. Huntington*	A	Dividend	J	T					
194. Orbital (OBTEF)*		None	J	T					
195. Merrill Lynch CMA Funds (cash)	B	Interest	L	T					
196. Amgen (AMGN)*		None	J	T					
197. Applied Material (AMAT)*	A	Dividend	J	T					
198. Ares Capital (ARCC)*	B	Dividend	K	T					
199. AT&T (T)*	A	Dividend	K	T					
200. Bristol-Myers Squibb (BMY)*	A	Dividend	J	T					
201. Coca Cola (KO)*	B	Dividend	J	T					
202. Conagra Foods (CAG)*	A	Dividend	J	T					
203. Eli Lilly (LLY)*	B	Dividend	K	T					
204. Intel (INTL)*	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 17 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

04/29/2015

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. KeyCorp (KEY)*	B	Dividend	K	T					
206. Marathon Oil (MRO)*	A	Dividend	J	T					
207. Marathon Petroleum (MPC)	A	Dividend	J	T					
208. Sony (SNE)*	A	Dividend	K	T					
209. Verizon Communications (VZ)*	A	Dividend	J	T					
210. Zimmer Holdings (ZMH)*		None	J	T					
211. Blackrock Mun Intermediate Fund (MUI)	C	Interest	K	T					
212. Nuveen Fund (NZF)	A	Interest	K	T					
213. CBS (CBSA)*	A	Dividend	J	T					
214. Goldman Sachs (GSMAX)		None	J	T					
215. Loomis Sayles (NEFZX)	A	Interest	J	T					
216. Merck (MRK)*	A	Dividend	J	T					
217. Cedar Fair (FUN)*	C	Dividend	L	T					
218. Deutsche Bank Pref Trust	B	Dividend	K	T					
219. Nationwide Bank (Accounts)	C	Interest	N	T					
220. Butler County (Bond)	B	Interest	K	T					
221. Henderson International (HFOAX) Fund	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 \$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 18 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

04/29/2015

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. IXJ	A	Dividend	K	T					
223. VGT	A	Dividend	J	T					
224. VEU	A	Dividend	J	T					
225. VOHXX	A	Dividend	K	T					
226. VOHIX	C	Dividend	K	T					
227. DFA US Core Equity (DFQTX)	B	Dividend	M	T					
228. DFA International Core (DFIEX)	B	Dividend	L	T					
229. DFA Emerging (DFCEX)	B	Dividend	K	T					
230. Schwab (Account) (cash)	A	Interest	K	T					
231. Bank of America (BAC)	A	Dividend	J	T					
232. VGK	A	Dividend	J	T					
233. Legg Mason Municipal High Fund (LMHIX)	A	Dividend	J	T					
234. Ohio State Higher Ed (Bonds)	C	Interest			Redeemed	01/15/14	K		
235. Montgomery County Ohio Rev (Bonds)	C	Interest			Redeemed	11/17/14	K		
236. Greene County Ohio Hos. (Bonds)	B	Interest	L	T					
237. ATOIX	B	Dividend	M	T					
238. XLP	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 19 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

04/29/2015

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. Dexcom		None	J	T					
240. VFSTX	A	Dividend	J	T					
241. Banco Santander (STD)	A	Dividend	J	T					
242. Cisco (CISCO)	A	Dividend	J	T					
243. Energy Sector Spdr. (XLE)	A	Dividend	J	T					
244. Kimberly Clark (KMB)	A	Dividend	K	T					
245. Kroger (KR)	A	Dividend	J	T					
246. Monsanto (MON)	A	Dividend	K	T					
247. Petroleo Brasileiro (PBR)	A	Dividend	J	T					
248. Qualcomm (QCOM)	A	Dividend	K	T					
249. Exelon (EXC)	B	Dividend	K	T					
250. Peabody (BTU)	A	Dividend	J	T					
251. Tortoise MLP Fund (NTG)	A	Dividend	J	T					
252. Blackrock Build America Fund (BBN)	A	Dividend	K	T					
253. Templeton Global Bond (TGBAX)	A	Dividend	J	T					
254. Lord Abbott Short Dur. (LDLFX)	A	Dividend			Sold	12/29/14	K		
255. Tortoise MLP Fund (NTG)	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 20 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

04/29/2015

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. Frontier (FTR)	A	Dividend	J	T					
257. Abbott (ABT)	A	Dividend	J	T					
258. Community Trust Bank (CTBI)	A	Dividend	J	T					
259. Newmont Mining (NEM)	A	Dividend	K	T					
260. ING Infrastructure (IDE) nka VOYA Infrastructure	A	Dividend	J	T					
261. Morgan Stanley PFD (MSK)	A	Dividend	J	T					
262. Proctor Gamble (PG)	A	Dividend	J	T					
263. Statoil (STO)	A	Dividend	J	T					
264. Teva (TEVA)	A	Dividend	J	T					
265. Transocean (RIG)	A	Dividend	J	T					
266. First Trust (FSD)	A	Dividend	J	T					
267. Berea Ohio School (Bond)	A	Interest	J	T					
268. Pfizer (PFE) / Mistakenly reported as Gabellis Utilities (GABUX)	A	Dividend	K	T					
269. Key Bank (Accounts)	B	Interest	M	T					
270. SB Financial Group fka Rurban Financial		None	J	T					
271. Abbvie (ABBV)	A	Dividend	J	T					
272. Apple (AAPL)	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 21 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

04/29/2015

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. Apache (APA)	A	Dividend	J	T					
274. Citrix (CTXS)		None	J	T					
275. Rio Tinto (RIO)	A	Dividend	J	T					
276. Suncor (SU)	A	Dividend	J	T					
277. Windstream (WIN)	B	Dividend	J	T					
278. HCP Inc. (HCP)	A	Dividend			Sold	10/14/14	J	A	
279. Vanguard High Dividend (VYM)	A	Dividend	J	T					
280. Halyard (HYH)		None	J	T	Spinoff (from line 244)	11/06/14	J		
281. California Resources (CRC)	A	Dividend	J	T	Spinoff (from line 189)	12/01/14	J		
282. Chicago Bridge & Iron (CBI)	A	Dividend	J	T	Buy	08/15/14	J		
283. Dorman (DORM)		None	J	T	Buy	09/15/14	J		
284. Amazon (AMZN)		None	J	T	Buy	05/07/14	J		
285. EBay (EBAY)		None	J	T	Buy	11/20/14	J		
286. Philip Morris (PM)	A	Dividend	K	T	Buy	01/14/14	K		
287. Zoetis (ZTS)	A	Dividend	J	T	Buy	03/31/14	J		
288. Vanguard Total Int. (VXUS)	A	Dividend	J	T	Buy	10/01/14	J		
289. Market Vector Short (SHYD)	A	Dividend	J	T	Buy	07/03/14	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 \$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	

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. 1 Share Japan (EWJ)	A	Dividend	J	T	Buy	04/10/14	J		
291. Power Shares Exchange (BKLN)	A	Dividend	J	T	Buy	04/29/14	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

04/29/2015

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

Names with asterisks are common stock.

Trust #1 (Line 2) is an Aggregate Ownership Arrangement in which [REDACTED] is a beneficiary or trustee of [REDACTED] trusts. Assets are itemized (Lines 3 - 120).

Blackrock Build America Bond Fund (Line 88) was distributed to [REDACTED] in December 2014.

Apollo Investment (AIY) (Line 113) was distributed to [REDACTED] in December 2014.

Deletions from 2013 Financial Disclosure Report

2013 FDR Line 126

SPDR Int. (DWX)

Combined with Line 110 for ease of reporting

Transfers from IRA #1 to IRA #4

2013 FDR Line 131

Gateway (GATEX)

Transferred to IRA #4 (now Line 168)

2013 FDR Line 135

1 Shares Russell Midcap (IWS)

Transferred to IRA #4 (now Line 169)

Additions to 2014 Financial Disclosure Report

Lines 117-119

Acquisitions made to Trust #1

Line 120 / Halyard

Spin-off from Line 85 / Kimberly Clark

Lines 170-174

Acquisitions made to IRA #4

Line 180

Acquisition made to Trust #5

Line 280 / Halyard (HYH)

Spin-off from Line 244 / Kimberly Clark (KMB)

Line 281/ California Resources (CRC)

Spin-off from Line 189 / Occidental Petroleum (OXY)

Lines 282-291

Acquisitions made [REDACTED]

FINANCIAL DISCLOSURE REPORT

Page 24 of 24

Name of Person Reporting

Zouhary, Jack

Date of Report

04/29/2015

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