

# FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2017

Report Required by the Ethics  
in Government Act of 1978  
(5 U.S.C. app. §§ 101-111)

|                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                          |                                                              |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------|
| <b>1. Person Reporting (last name, first, middle initial)</b><br>Jackson, Jr., Stephen B.                                                                                                                 | <b>2. Court or Organization</b><br>United States District Court, Southern District of Iowa                                                                                                                                                                                               | <b>3. Date of Report</b><br>05/04/2018                       |
| <b>4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)</b><br>United States Magistrate Judge (full-time)                                        | <b>5a. Report Type (check appropriate type)</b><br><input type="checkbox"/> Nomination <input type="checkbox"/> Date<br><input type="checkbox"/> Initial <input checked="" type="checkbox"/> Annual <input type="checkbox"/> Final<br><b>5b.</b> <input type="checkbox"/> Amended Report | <b>6. Reporting Period</b><br>01/01/2017<br>to<br>12/31/2017 |
| <b>7. Chambers or Office Address</b><br>United States Courthouse<br>131 E. 4th Street<br>Davenport, IA 52801                                                                                              |                                                                                                                                                                                                                                                                                          |                                                              |
| <p align="center"><b>IMPORTANT NOTES:</b> The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.</p> |                                                                                                                                                                                                                                                                                          |                                                              |

## 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. 2010 | State of Iowa Judicial Retirement System, defined benefit pension, no control |
| 2.      |                                                                               |
| 3.      |                                                                               |

**FINANCIAL DISCLOSURE REPORT**

Page 2 of 10

Name of Person Reporting

Jackson, Jr., Stephen B.

Date of Report

05/04/2018

**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><br>(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. 2017     | Self-employed professional organizer |
| 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 Notre Dame Law School | February 3-6, 2017 | Notre Dame, IN  | Trial Advocacy Teaching | Lodging                       |
| 2.                                     |                    |                 |                         |                               |
| 3.                                     |                    |                 |                         |                               |
| 4.                                     |                    |                 |                         |                               |
| 5.                                     |                    |                 |                         |                               |

**FINANCIAL DISCLOSURE REPORT**

Page 3 of 10

Name of Person Reporting

Jackson, Jr., Stephen B.

Date of Report

05/04/2018

**V. GIFTS.** *(Includes those to spouse and dependent children; see pp. 28-31 of filing instructions.)*NONE *(No reportable gifts.)*

|    | <u>SOURCE</u> | <u>DESCRIPTION</u> | <u>VALUE</u> |
|----|---------------|--------------------|--------------|
| 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.)*

|    | <u>CREDITOR</u> | <u>DESCRIPTION</u>                                           | <u>VALUE CODE</u> |
|----|-----------------|--------------------------------------------------------------|-------------------|
| 1. | U.S. Bank       | Mortgage on vacation/rental property, (Part VII.,<br>Line 1) | M                 |
| 2. |                 |                                                              |                   |
| 3. |                 |                                                              |                   |
| 4. |                 |                                                              |                   |
| 5. |                 |                                                              |                   |

# FINANCIAL DISCLOSURE REPORT

Page 4 of 10

Name of Person Reporting

Jackson, Jr., Stephen B.

Date of Report

05/04/2018

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 1. Vacation/rental property, (2013 \$217,000)                                                                               | E                                       | Rent                                          | M                                               | R                                         |                                                 |                         |                                 |                                |                                                                   |
| 2. U.S. Bank Accounts                                                                                                       | A                                       | Interest                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 3. IRA #1 (H)                                                                                                               |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 4. - AQR Managed Futures Strategy                                                                                           | A                                       | Dividend                                      | J                                               | T                                         | Buy<br>(add'l)                                  | 7/5/17                  | J                               |                                |                                                                   |
| 5. - DFA Investment Grade                                                                                                   | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 6. - DFA International Vector Equity                                                                                        | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 7. - DFA International Value                                                                                                | A                                       | Dividend                                      | J                                               | T                                         | Buy<br>(add'l)                                  | 6/27/17                 | J                               |                                |                                                                   |
| 8. - DFA Emerging Markets Core Equity                                                                                       | A                                       | Dividend                                      | K                                               | T                                         | Buy<br>(add'l)                                  | 6/27/17                 | J                               |                                |                                                                   |
| 9. - DFA Emerging Markets Small Cap                                                                                         | A                                       | Dividend                                      | J                                               | T                                         | Buy<br>(add'l)                                  | 6/27/17                 | J                               |                                |                                                                   |
| 10. - DFA Global Fixed Income                                                                                               | A                                       | Dividend                                      | J                                               | T                                         | Sold<br>(part)                                  | 6/27/17                 | J                               | A                              |                                                                   |
| 11. - DFA International Core Equity                                                                                         | A                                       | Dividend                                      | K                                               | T                                         | Buy<br>(add'l)                                  | 6/27/17                 | J                               |                                |                                                                   |
| 12. - DFA Short Term Extended Quality                                                                                       | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 13. - DFA US Large Cap Growth                                                                                               | A                                       | Dividend                                      | K                                               | T                                         | Sold<br>(part)                                  | 6/27/17                 | J                               | B                              |                                                                   |
| 14. - DFA US Core Equity                                                                                                    | A                                       | Dividend                                      | K                                               | T                                         | Sold<br>(part)                                  | 6/27/17                 | J                               | B                              |                                                                   |
| 15. - DFA One-Year Fixed Income                                                                                             | A                                       | Dividend                                      | J                                               | T                                         | Buy<br>(add'l)                                  | 6/27/17                 | J                               |                                |                                                                   |
| 16.                                                                                                                         |                                         |                                               |                                                 |                                           | Sold<br>(part)                                  | 6/29/17                 | J                               | A                              |                                                                   |
| 17. - DFA US Targeted Value                                                                                                 | B                                       | Dividend                                      | K                                               | T                                         | Sold<br>(part)                                  | 6/27/17                 | J                               | A                              |                                                                   |

|                         |                                  |                             |                                |                                 |                         |
|-------------------------|----------------------------------|-----------------------------|--------------------------------|---------------------------------|-------------------------|
| 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 5 of 10

Name of Person Reporting

Jackson, Jr., Stephen B.

Date of Report

05/04/2018

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code I<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                        |   |          |   |   |                |          |   |   |  |
|----------------------------------------|---|----------|---|---|----------------|----------|---|---|--|
| 18.                                    |   |          |   |   | Buy<br>(add'l) | 12/18/17 | J |   |  |
| 19. - DFA Two-Year Global Fixed Income | A | Dividend | J | T |                |          |   |   |  |
| 20. - Diamond Hill Long Short          | A | Dividend | J | T |                |          |   |   |  |
| 21. - Permanent Portfolio              | A | Dividend | J | T |                |          |   |   |  |
| 22. - Vanguard Reit Index              | A | Dividend | J | T |                |          |   |   |  |
| 23. IRA #2 (H)                         |   |          |   |   |                |          |   |   |  |
| 24. - AQR Managed Future Strategy      | A | Dividend | J | T | Buy<br>(add'l) | 6/21/17  | J |   |  |
| 25. - DFA Investment Grade             | A | Dividend | J | T |                |          |   |   |  |
| 26. - DFA International Vector Equity  | A | Dividend | J | T |                |          |   |   |  |
| 27. - DFA International Value          | A | Dividend | J | T |                |          |   |   |  |
| 28. - DFA Emerging Markets Core Equity | A | Dividend | J | T | Buy<br>(add'l) | 6/21/17  | J |   |  |
| 29. - DFA Emerging Markets Small Cap   | A | Dividend | J | T |                |          |   |   |  |
| 30. - DFA Global Fixed Income          | A | Dividend | J | T |                |          |   |   |  |
| 31. - DFA International Core Equity    | A | Dividend | J | T | Buy<br>(add'l) | 6/21/17  | J |   |  |
| 32. - DFA Short Term Extended Quality  | A | Dividend | J | T |                |          |   |   |  |
| 33. - DFA US Large Cap Growth          | A | Dividend | J | T | Sold<br>(part) | 6/21/17  | J | A |  |
| 34. - DFA US Core Equity               | A | Dividend | K | T | Sold<br>(part) | 6/21/17  | J | A |  |

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

# FINANCIAL DISCLOSURE REPORT

Page 6 of 10

Name of Person Reporting

Jackson, Jr., Stephen B.

Date of Report

05/04/2018

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |

|                                               |   |          |   |   |                |         |   |   |  |
|-----------------------------------------------|---|----------|---|---|----------------|---------|---|---|--|
| 35. - DFA US Targeted Value                   | A | Dividend | K | T | Sold<br>(part) | 6/21/17 | J | A |  |
| 36. - DFA One-Year Fixed Income               | A | Dividend | J | T | Buy<br>(add'l) | 6/21/17 | J |   |  |
| 37.                                           |   |          |   |   | Sold<br>(part) | 6/21/17 | J | A |  |
| 38. - DFA Two-Year Global Fixed Income        | A | Dividend | J | T |                |         |   |   |  |
| 39. - Diamond Hill Long Short                 | A | Dividend | J | T | Sold<br>(part) | 6/21/17 | J | A |  |
| 40. - Permanent Portfolio                     | A | Dividend | J | T |                |         |   |   |  |
| 41. - Vanguard Reit Index                     | A | Dividend | J | T |                |         |   |   |  |
| 42. IRA #3 (H)                                |   |          |   |   |                |         |   |   |  |
| 43. - Russell Lifepoints Fund Growth Strategy | A | Dividend | K | T |                |         |   |   |  |
| 44. -Spdr S&P 500                             | A | Dividend | J | T |                |         |   |   |  |
| 45. -DFA 2035 Target Date                     | A | Dividend | J | T | Buy            | 4/5/17  | J |   |  |
| 46. TIAA CREF 457(b)(H)                       |   |          |   |   |                |         |   |   |  |
| 47. - TIAA CREF Lifecycle 2030                | A | Dividend | J | T |                |         |   |   |  |
| 48. TIAA CREF 401(a)(H)                       |   |          |   |   |                |         |   |   |  |
| 49. - TIAA CREF S&P 500 Index                 | A | Dividend | J | T |                |         |   |   |  |
| 50. 529 Plan #1 (H)                           |   |          |   |   |                |         |   |   |  |
| 51. -BlackRock Mod +17 Age Based Option       | A | Dividend |   |   | Sold           | 12/1/17 | J | B |  |

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

# FINANCIAL DISCLOSURE REPORT

Page 7 of 10

Name of Person Reporting

Jackson, Jr., Stephen B.

Date of Report

05/04/2018

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "X" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|---------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                           | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 52. - BlackRock Aggressive Growth                                                                                         | A                                       | Dividend                                      | J                                               | T                                         | Sold<br>(part)                                  | 8/2/17                  | J                               | B                              |                                                                   |
| 53. -BlackRock College Enrollment-A                                                                                       | A                                       | Dividend                                      | J                                               | T                                         | Buy                                             | 12/1/17                 | J                               |                                |                                                                   |
| 54. 529 Plan #2 (H)                                                                                                       |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 55. - Amcap Fund                                                                                                          | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 56. - American Balanced Fund                                                                                              | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 57. - American High Income Trust                                                                                          | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 58. - Capital Income Builder                                                                                              | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 59. - Capital World Growth and Income                                                                                     | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 60. - Fundamental Investor                                                                                                | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 61. - Growth Fund of America                                                                                              | A                                       | Dividend                                      | J                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 62. 529 Plan #3 (H)                                                                                                       |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 63. - Ohio Tuition Trust Fifth Third Cash<br>Account                                                                      | A                                       | Interest                                      | L                                               | T                                         | Sold<br>(part)                                  | 7/26/17                 | K                               |                                |                                                                   |
| 64. - Ohio Tuition Trust Fifth Third Cash<br>Account                                                                      |                                         |                                               |                                                 |                                           | Sold<br>(part)                                  | 12/8/17                 | J                               |                                |                                                                   |
| 65. Trust #1 (H) (Beneficiary)                                                                                            |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 66. - American Funds Money Market A                                                                                       |                                         | None                                          |                                                 |                                           | Closed                                          | 1/23/17                 | J                               |                                |                                                                   |
| 67. Trust #2 (H) (Beneficiary)                                                                                            |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 68. - Lincoln Universal Life Insurance                                                                                    | B                                       | Interest                                      | K                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |

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

# FINANCIAL DISCLOSURE REPORT

Page 8 of 10

Name of Person Reporting

Jackson, Jr., Stephen B.

Date of Report

05/04/2018

## 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.<br>Description of Assets<br>(including trust assets)<br><br>Place "(X)" after each asset<br>exempt from prior disclosure | B.<br>Income during<br>reporting period |                                               | C.<br>Gross value at end<br>of reporting period |                                           | D.<br>Transactions during reporting period      |                         |                                 |                                |                                                                   |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------------------------------|-------------------------------------------------|-------------------------------------------|-------------------------------------------------|-------------------------|---------------------------------|--------------------------------|-------------------------------------------------------------------|
|                                                                                                                             | (1)<br>Amount<br>Code 1<br>(A-H)        | (2)<br>Type (e.g.,<br>div., rent,<br>or int.) | (1)<br>Value<br>Code 2<br>(J-P)                 | (2)<br>Value<br>Method<br>Code 3<br>(Q-W) | (1)<br>Type (e.g.,<br>buy, sell,<br>redemption) | (2)<br>Date<br>mm/dd/yy | (3)<br>Value<br>Code 2<br>(J-P) | (4)<br>Gain<br>Code 1<br>(A-H) | (5)<br>Identity of<br>buyer/seller<br>(if private<br>transaction) |
| 69. Trust #3 (H) (Beneficiary)                                                                                              |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 70. - Transamerica Universal Life Insurance                                                                                 | C                                       | Interest                                      | M                                               | T                                         |                                                 |                         |                                 |                                |                                                                   |
| 71. LPL Investment Acct (H)                                                                                                 |                                         |                                               |                                                 |                                           |                                                 |                         |                                 |                                |                                                                   |
| 72. - DFA Global, Alloc. 60/40                                                                                              | A                                       | Dividend                                      | J                                               | T                                         | Buy<br>(add'l)                                  | 01/09/17                | J                               |                                |                                                                   |
| 73.                                                                                                                         |                                         |                                               |                                                 |                                           | Buy<br>(add'l)                                  | 2/7/17                  | J                               |                                |                                                                   |
| 74.                                                                                                                         |                                         |                                               |                                                 |                                           | Buy<br>(add'l)                                  | 4/10/17                 | J                               |                                |                                                                   |

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

# FINANCIAL DISCLOSURE REPORT

Page 9 of 10

Name of Person Reporting

Jackson, Jr., Stephen B.

Date of Report

05/04/2018

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

Section VII. Investments and Trusts. DFA is abbreviation for Dimensional Fund Advisors.

# FINANCIAL DISCLOSURE REPORT

Page 10 of 10

Name of Person Reporting

Jackson, Jr., Stephen B.

Date of Report

05/04/2018

## 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/ Stephen B. Jackson, Jr.

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