



Filing ID #10003590

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Mr. James D Jordan  
**Status:** Member  
**State/District:** OH04

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2013  
**Filing Date:** 07/11/2014

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DCX Fund (closed out in 2013)		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: (see Sch B)					
FID Contrafund (closed out in 2013)		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
DESCRIPTION: (see Sch B)					
JP Morgan Chase Bank HSA		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Ohio Public Employees Retirement System Defined Benefit Plan		\$100,001 - \$250,000	None		<input type="checkbox"/>
Ohio State Teachers Retirement System Defined Benefit Plan	SP	\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Ohio State Teachers Retirement System Defined Benefit Plan		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
PRC Printing & Publishing Victory: A Guide to Sports Nutrition at the Training Table (1994)		Undetermined	Royalties	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Second National Bank	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Self employment income - Polly Jordan Art Teacher	SP	Undetermined	Business Income	\$1,001 - \$2,500	<input type="checkbox"/>
DESCRIPTION: Self employment income- Polly Jordan Art Teacher					
Universal Guaranty Life	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Universal Guaranty Life		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

SCHEDULE B: TRANSACTIONS

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
DCX Fund - Ohio Def. Comp Plan		07/1/2013	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: 80.38499660 shares at 142.88. Proceeds reinvested into Stable Value Option.					
FID Contrafund - Ohio Def. Comp Plan		07/1/2013	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
DESCRIPTION: 140.76750816 shares at 86.36 Proceeds reinvested into for Stable Value Option.					
Stable Value Option - Ohio Def. Comp Plan		07/1/2013	E	\$1,001 - \$15,000	
DESCRIPTION: 4417.02661246 shares at 2.75223155 Exchanged funds from DCX Fund and then paid out to Mr. Jordan. (see Sch C)					
Stable Value Option - Ohio Def. Comp Plan		07/1/2013	E	\$1,001 - \$15,000	
DESCRIPTION: 4173.12634905 shares at 2.75223155 Exchanged from fund from FID Contrafund and then paid out to Mr. Jordan. (see Sch C)					

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Sole proprietorship operated by spouse to teach art.	Sole proprietorship operated by spouse to teach art.	\$1,090
Ohio Public Employees Def. Compensation Plan	Ohio Public Employees Def. Compensation Plan	\$23,708

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Second National Bank	June 2, 2003	Mortgage on Personal Residence, Urbana, OH	\$15,001 - \$50,000
	University of Iowa Credit Union	August 19, 2013	co-maker of school loan for daughter	\$15,001 - \$50,000

**SCHEDULE E: POSITIONS**

None disclosed.

**SCHEDULE F: AGREEMENTS**

Date	Parties To	Terms of Agreement
1987	James D. Jordan - Ohio Public Employees Retirement System	Agreement with former employer, State of Ohio, during period of 1987 to 2006 for service credits toward retirement or permanent disability benefits. Not self-directed.
1987	James D. Jordan - Ohio Public Employees Def Comp Program	Agreement with former employer, State of Ohio, during period of 1987 to 2006 for contributions by employer to deferred compensation account. (Closed in 2013)
June 1993	PRC Publishing, James D. Jordan, Polly Jordan, Dr. Craig Horswill	Royalty agreement for publishing of book "Victory at the Training Table". JD Jordan co-author.

**SCHEDULE G: GIFTS**

None disclosed.

**SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS**

None disclosed.

**SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA**

None disclosed.

**EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION**

**IPO:** Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

## COMMENTS

## CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Mr. James D Jordan , 07/11/2014