



Form No. OEC-2025-P
OHIO ETHICS COMMISSION
FINANCIAL DISCLOSURE STATEMENT

25P

This statement is to be filed in **2026**
 Financial information for calendar year **2025**

Please type or print clearly. See [instructions](#) for assistance with completing this statement.

SECTION A. PERSONAL CONTACT INFORMATION

Last Name: First Name: MI:

Address: City: State: Zip:

County: E-mail Address: Phone:

SECTION B. PUBLIC POSITION APPLYING FOR

Position/Title:

Public entity you will serve if appointed:

Term Start Date:

Month	Day	Year
0	4	1 1 2 0 2 6

Term End Date:

Month	Day	Year
0	4	1 0 2 0 3 1

FOR OFFICIAL USE ONLY

1. SOURCES OF INCOME

(For help, see instructions [page 2](#))

I have no sources of income that I am required to list.

Source of Income	Service Provided	Amount* (if required)
A		
B		
C		
D		
E		
F		
G		
H		
I		

* Check [instructions](#) to see whether you are required to disclose amounts of income.

FOR OHIO ETHICS COMMISSION USE ONLY

Reviewed by: Filer has answered every required question.
 Filer has not answered these questions: _____

Date incomplete form returned to filer: _____
 Date completed form returned to OEC: _____

2. SOURCES OF GIFTS(For help, see instructions [page 3](#)) I have no sources of gifts that I am required to list.

Source of Gift	Source of Gift
A	D
B	E
C	F

3. NAMES OF SPOUSE RESIDING IN HOUSEHOLD AND ANY DEPENDENT CHILDREN(For help, see instructions [page 3](#)) There are no immediate family members whose names I am required to list.

Spouse Residing in Household	Dependent Children
Dependent Children	

4. NAMES OF BUSINESSES(For help, see instructions [page 3](#))

If you or anyone you listed in Question 3 owns or operates a business, list the name of the business.

 There are no business names that I am required to list.

Business Name	Business Name
A	C
B	D

5. LAND (REAL ESTATE) IN OHIO(For help, see instructions [page 4](#)) I have no real estate that I am required to list.

Land (Real Estate) in Ohio (List address or, if address is unavailable, plat number and county)
A
B
C
D
E
You are not required to disclose your personal residence or real property held primarily for personal recreation.

6. CREDITORS OVER \$1,000(For help, see instructions [page 4](#)) I have no creditors that I am required to list.

Creditor	Creditor
A	D
B	E
C	F

7. DEBTORS OVER \$1,000(For help, see instructions [page 4](#)) I have no debtors that I am required to list.

Debtor	Debtor
A	C
B	D

8. INVESTMENTS OVER \$1,000(For help, see instructions [page 4 and 5](#)) I have no investments that I am required to list.

Corporation, Trust, Business Trust, Partnership, or Association	Nature of Investment
A	
B	
C	
D	
E	
F	
G	
H	
I	
J	
K	
L	
IF YOU NEED ADDITIONAL SPACE, PLEASE ATTACH A SEPARATE SHEET.	

9. OFFICES/FIDUCIARY RELATIONSHIPS(For help, see instructions [page 6](#)) I have no offices or fiduciary relationships that I am required to list.

Corporation, Trust, Business Trust, Partnership, or Association	Office or Nature of Relationship
A	
B	
C	
D	
E	

10. FOOD OR BEVERAGES(For help, see instructions [page 6](#))

List any source of payment for meals, food, or beverages valued at over \$100 that was received in connection with your official duties as a PUCO Commissioner by you or any other person for your use of benefit in 2025.

 I have no sources of meals, food, or beverages that I am required to list.

Source of Food or Beverages	Source of Food or Beverages
A	C
B	D

11. TRAVEL EXPENSES

(For help, see instructions [page 7](#))

List both the source and the amount of each individual payment of travel expenses that was received in connection with your official duties as a PUCO Commissioner by you or any other person for your use or benefit in 2025.

I have no sources of travel expenses that I am required to list.

Source of Travel Expenses	Amount
A	
B	
C	
D	
E	
F	

12. NON-DISPUTED INFORMATION

(For help, see instructions [page 7](#))

I have no information that I am required to list.

Non-Disputed Information
A
B

13. SIGNATURE

(For help, see instructions [page 8](#))

By signing this statement:

- I swear or affirm that this statement and any additional attachments have been prepared or carefully reviewed by me, and constitute my complete, truthful, and correct disclosure of all required information, and that the address listed on page 1 is a correct mailing address.
- I acknowledge and understand that, among other potential violations and penalties, knowingly filing a false statement is a criminal misdemeanor of the first degree, in violation of Section 2921.13(A)(7) of the Revised Code, punishable by a fine of not more than \$1,000, imprisonment of not more than six months, or both.

If you have any questions before signing this form, please contact the Ohio Ethics Commission at (614) 466-7090.

Before signing this statement, please review to make sure that you have answered each question you are required to answer. If you have nothing to list in response to any question, check the box indicating that you have nothing to list. If the response to any required question is omitted, the Commission will return the statement to you as incomplete.

YOUR SIGNATURE IS REQUIRED HERE: _____

Date: _____

Completed statements must be sent by U.S. Mail, be hand-delivered, or emailed to:

Public Utilities Commission of Ohio Nominating Council
 180 East Broad Street, 11th Floor
 Columbus, OH 43215-3793
PUCNominatingCouncil@puco.ohio.gov



BEFORE FILING YOUR STATEMENT



Do NOT leave any questions for which you are required to answer blank. If you have nothing that you are required to list for any required question, you must check the corresponding box indicating that you have no information that you are required to list.

For example, if you do not have any debtors that you are required to list, you should check the corresponding box indicating that you have no debtors that you are required to list, as seen below:

7. DEBTORS OVER \$1,000 - ALL FILERS MUST ANSWER THIS QUESTION:

(For help, see instructions [page 6](#))

I have no debtors that I am required to list.

Debtor		Debtor	
A		C	
B		D	

Failure to provide a proper response to any question will result in an incomplete filing.



OHIO ETHICS COMMISSION FORM NO. OEC-2025-P FINANCIAL DISCLOSURE STATEMENT INSTRUCTIONS

GENERAL INFORMATION

PURPOSE OF FINANCIAL DISCLOSURE AND REQUIREMENT FOR DISCLOSURE:

Filing a financial disclosure statement is part of the responsibility of choosing to hold or run for public office or employment. The purpose of requiring public officials and employees to file financial disclosure statements is to increase confidence in government and openness by: (1) Assisting public servants in identifying potential conflicts of interest; and (2) Allowing citizens to become aware of the financial interests of the officials and employees who serve them.

FILING DEADLINE:

The disclosure statement must be received by the Public Utilities Commission of Ohio Nominating Council by 5:00 PM on:

FRIDAY, JANUARY 9, 2026.

PUBLIC RECORDS:

Once filed, every disclosure statement is a public record. The statements and their attachments will be made available for public inspection. For security purposes, filers should NOT list or attach any of the following to their disclosure statements: (a) social security numbers; (b) account numbers for bank, credit card, or investment accounts; or (c) IRS documents or filings.



OHIO ETHICS COMMISSION FORM NO. OEC-2025-P FINANCIAL DISCLOSURE STATEMENT INSTRUCTIONS

STEP-BY-STEP INSTRUCTIONS

QUESTION 1—SOURCES OF INCOME:

[For more information, check out FAQs on Income](#)

“Income” includes:

1. “Gross income” as defined in the federal Internal Revenue Code (26 USC 61); and
2. Interest and dividends on all governmental securities, whether federal, state, or local.

Examples of “gross income” include compensation for services (such as salary), interest, rent, and pensions.

You must list every source of income, regardless of amount, that: (a) you received in 2025; or (b) any other person received in 2025 for your use or benefit. Following each source of income, briefly describe the services you provided in return for the income.

Another person has received income for your “use or benefit” if the source’s purpose for giving compensation to that person is to provide it for your use or for your benefit. For example, if you are a beneficiary of a trust, the trust earns income for your use or benefit. You must list the trust as a source of income and all sources of income received by the trust. For more information about trust disclosure, see [Advisory Opinion No. 2005-01](#).

You are **not required** to disclose:

- A. Your spouse’s income sources (although you may benefit from your spouse’s income, he or she usually does not receive income for the purpose of providing it to you [see [Advisory Opinion No. 75-036](#)]); or
- B. The names of clients, patients, or customers of your business or practice (simply disclose the business or practice).

Amount of Income: You must also disclose the amount of income you received from any source, IF:

1. The source is doing or seeking to do business with the public agency you serve; or
2. You earned the income because you provided goods or services to a legislative agent (lobbyist).
[See R.C. 101.70 or contact the Joint Legislative Ethics Committee for a list of registered lobbyists.]

EXAMPLES:

Source of Income	Service Provided	Amount* (if required)
A Your Employer(s)	Your position(s)	
B Smith & Jones Co., L.P.A.	Private law practice	
C Your Pension Fund	Retirement	
D XYZ Corporation	Stock dividends	
E Friendly National Bank	Interest on savings account	\$45.00**

** Because this bank is a depository for the filer’s public agency, the amount must also be disclosed.



OHIO ETHICS COMMISSION FORM NO. OEC-2025-P FINANCIAL DISCLOSURE STATEMENT INSTRUCTIONS

QUESTION 2—SOURCES OF GIFTS:

[For more information, check out FAQs on Gifts](#)

You must list every source of a single gift valued at over \$75 or multiple gifts with a total value of over \$75 that:

- A. You personally received in 2025; and
- B. Any other person received for your use or benefit in 2025.

Another person has received a gift for your “use or benefit” if the giver’s purpose for giving a gift to that person is to provide it for your use or for your benefit. For example, if your spouse has received a gift and the giver’s purpose is to provide the gift to you, your spouse received the gift for your use or benefit. See [Advisory Opinion No. 2009-01](#)

Sources of gifts can include individuals, corporations, or groups of individuals or corporations, such as co-workers, not-for-profit organizations, and trade associations.

You are **not required** to disclose:

- A. The nature of the gift;
- B. Campaign contributions;
- C. Gifts received by will or inheritance or by distribution from a trust established by a spouse or ancestor;
- D. Gifts received from any of these family members: spouse, parents, grandparents, children, grandchildren, siblings, nephews, nieces, uncles, aunts, brothers- or sisters-in-law, sons- or daughters-in-law, or parents-in-law; or
- E. Gifts from any person to whom you stand in the place of a parent.

QUESTION 3—IMMEDIATE FAMILY MEMBER:

[For more information, check out FAQs on Family Members](#)

List the names of your spouse living in your household and any dependent children.

QUESTION 4—NAMES OF BUSINESSES:

[For more information, check out FAQs on Business Names](#)

List all names under which you, or any of the immediate family members you listed in response to Question 3, do business. For example, list the name of any business that you or your immediate family members own or operate.

EXAMPLES:

- A. You are a partner in a law firm named Smith & Jones. You should list “Smith & Jones.”
- B. Your spouse who lives with you has an accounting firm called Ace Accounting. You should list “Ace Accounting.”
- C. Your dependent child mows lawns under a business called Carl’s Lawn Service. You should list “Carl’s Lawn Service.”



OHIO ETHICS COMMISSION FORM NO. OEC-2025-P FINANCIAL DISCLOSURE STATEMENT INSTRUCTIONS

QUESTION 5—LAND (REAL ESTATE):

[For more information, check out FAQs on Real Estate](#)

List all of your leasehold and ownership interests in land and real estate located in Ohio.

NOTE: Because of an exception in the law, you are **not required** to disclose:

- A. Your personal residence; or
- B. Any property you use primarily for personal recreation.

QUESTION 6—CREDITORS:

[For more information, check out FAQs on Creditors](#)

List the name of any person or business residing or transacting business in Ohio to whom you owe, or owed, in 2025, more than \$1000 in your own name or in the name of any other person.

For example, if you charged more than \$1000 on a credit card during 2025, you must disclose the name of the credit card issuer even if you paid off the card during the grace period.

NOTE: Because of an exception in the law, you are **not required** to disclose a creditor if the debt:

- A. Is secured on your personal residence (such as a mortgage or home equity loan);
- B. Is secured on real estate used primarily for personal recreation (such as a home equity loan); or
- C. Results from the ordinary conduct of your business or profession.

QUESTION 7—DEBTORS:

[For more information, check out FAQs on Debtors](#)

List the name of anyone residing or transacting business in Ohio who owed you, or any other person for your use or benefit, more than \$1000 during 2025.

NOTE: Because of an exception in the law, you are **not required** to disclose as a debtor:

- A. A bank or other financial institution if the only money it owes to you is money you deposited with it;
- B. Any person who owes you money as a result of the ordinary conduct of your business or profession; or
- C. Clients or patients who owe you money if you are a lawyer, doctor, or psychologist.

QUESTION 8—INVESTMENTS:

[For more information, check out FAQs on Investments](#)
and [Advisory Opinion No. 2011-01](#)

List the name of each corporation that is incorporated in, or holds a certificate of compliance to do business in, Ohio, and every trust, business trust, partnership, or association that transacts business in Ohio, in which during 2025:

- A. You had an investment of over \$1000 at any time during the year; and
- B. Any other person had an investment of over \$1000 for your use or benefit at any time during the year. For example, investments made by the manager of a trust for which you are the trust beneficiary.

You should list any investment you held at any time in 2025, even if you sold or otherwise disposed of it during the year. Briefly describe the nature of each investment you disclose.



OHIO ETHICS COMMISSION FORM NO. OEC-2025-P FINANCIAL DISCLOSURE STATEMENT INSTRUCTIONS

EXAMPLES:

Corporation, Trust, Business Trust, Partnership, or Association	Nature of Investment
A ABC Growth Fund	Mutual Fund
B XYZ Corporation	Common Stock
C Mid-Ohio Power	Corporate Bond
D Smith Family Trust	Beneficiary
E Planet Us Company	Stock [Held by Smith Family Trust]*
F Merrill Lynch	Brokerage Account
G 123 Corporation	Stock [Held in Merrill Lynch Account]*
H Janus Large Cap Fund	Mutual Fund [Held in Merrill Lynch Account]*
I LifePath 2030	Deferred Compensation Investment
J Popular Company	Stock in IRA
K MegaGrowth Fund	Mutual Fund in 401(k) Account

* Information in brackets is included for illustration purposes. You are not required to disclose these details on your statement.

QUICK INVESTMENT DISCLOSURE GUIDE

([Advisory Opinion No. 2011-01](#))

If I have more than \$1,000 invested in a(n).....	Do I need to disclose this investment?	Do I need to list the individual holdings within this investment?
Mutual Fund	Yes	No
Stock	Yes	No
Bond	Yes	No
Brokerage Account	Yes	Yes
Managed Account	Yes	Yes
Trust (Beneficiary)	Yes	Yes
Investment Club Account	Yes	Yes
529 Plan	Yes	Yes
ESA	Yes	Yes
Public Retirement System Account (PERS, STRS, SERS, HPRS, or OPFPF)	No	No
Social Security	No	No

NOTE: You are **not required** to disclose:

- A. Saving and checking accounts, certificates of deposit, and other deposits with financial institutions; or
- B. Personal identifying information such as social security or investment account numbers.

For more information, please visit ethics.ohio.gov or call (614) 466-7090.



OHIO ETHICS COMMISSION FORM NO. OEC-2025-P FINANCIAL DISCLOSURE STATEMENT INSTRUCTIONS

QUESTION 9—OFFICES AND FIDUCIARY RELATIONSHIPS: [For more information, check out FAQs on Fiduciary Interest](#)

List the name of each corporation that is incorporated in, or holds a certificate of compliance to do business in, Ohio, and every trust, business trust, partnership, or association incorporated or authorized to do business in Ohio, or transacting business in Ohio:

- A. In which you held an office in 2025; or
- B. With which you had a fiduciary relationship in 2025.

A person has a “**fiduciary relationship**” with an entity if he or she has the authority to make decisions in the entity’s interests.

EXAMPLES:

	Corporation, Trust, Business Trust, Partnership, or Association	Office or Nature of Relationship
A	Buckeye Friends Trust	Trustee
B	Smith & Jones Co., L.P.A.	Partner
C	Let us Help Association (non-profit)	Member, Board of Directors
D	Smith Cleaning Company	President/CEO

QUESTION 10—MEALS, FOOD, AND BEVERAGES: [For more information, check out FAQs on Meals](#)

List **any source** of payment for meals, food, or beverages valued at over \$100 that was received in connection with your official duties as a Public Utilities Commission of Ohio Commissioner by you or any other person for your use or benefit in 2025.

Include the Public Utilities Commission of Ohio if it paid for more than \$100 of meals, food, or beverages for you.

NOTE: Because of an exception in the law, you are **not required** to disclose anyone who provided meals, food, or beverages to you:

- A. At a meeting where you participated in a panel, seminar, or speaking engagement; or
- B. At a meeting or convention of a national or state organization to which any state agency, legislative agency, state institution of higher education, political subdivision, or office or agency thereof, pays membership dues.



OHIO ETHICS COMMISSION FORM NO. OEC-2025-P FINANCIAL DISCLOSURE STATEMENT INSTRUCTIONS

QUESTION 11—TRAVEL EXPENSES:

[For more information, check out FAQs on Travel Expenses](#)

List **both** the source and the amount of each individual payment of travel expenses, received in 2025, that was:

- A. Received by you in connection with your official duties as a Public Utilities Commission of Ohio Commissioner; or
- B. Paid to any other person for your use or benefit in connection with your official duties as a Public Utilities Commission of Ohio Commissioner.

Include the Public Utilities Commission of Ohio if it paid for or reimbursed travel expenses for you.

You must list each payment or reimbursement separately. Travel expenses include parking fees, lodging, airline tickets, and mileage reimbursements.

NOTE: Because of an exception in the law, you are **not required** to disclose anyone who provided travel expenses to a meeting or convention of a national or state organization to which any state agency, legislative agency, state institution of higher education, political subdivision, or office or agency thereof, pays membership dues.

QUESTION 12—NON-DISPUTED INFORMATION:

If you received a statement from a legislative agent, executive agency or retirement system lobbyist or the employer of such that identifies you as the recipient of expenditures made by that lobbyist or employer, and you do not dispute the information contained in the statement, attach a copy of the statement or list the non-disputed information below. If you dispute a legislative lobbying expenditure made in your name please contact the Office of the Legislative Inspector General at **614-728-5100**. To dispute an executive or retirement system expenditure made in your name, please contact the Ohio Ethics Commission.



OHIO ETHICS COMMISSION FORM NO. OEC-2025-P FINANCIAL DISCLOSURE STATEMENT INSTRUCTIONS

QUESTION 13—SIGNATURE:

Please note that by signing your financial disclosure statement:

- You swear or affirm that this statement and any additional attachments have been prepared or carefully reviewed by you, and constitute your complete, truthful, and correct disclosure of all required information.
- You acknowledge and understand that, among other potential violations and penalties, knowingly filing a false statement is a criminal misdemeanor of the first degree, in violation of Section 2921.13(A)(7) of the Ohio Revised Code punishable by a fine of not more than \$1,000, imprisonment of not more than six months, or both;

BEFORE SIGNING AND SENDING YOUR STATEMENT:

Please carefully review your disclosure statement to make sure that you have answered ALL required questions, either by disclosing the information required or checking the appropriate box indicating that you have no information to disclose. Incomplete statements will be returned for completion.

Completed statements must be sent by U.S. Mail, be hand-delivered, or emailed to:

Public Utilities Commission of Ohio Nominating Council
180 East Broad Street, 11th Floor
Columbus, Ohio 43215-3793
PUCNominatingCouncil@puco.ohio.gov

*If you have any questions before signing this statement, please contact
the Ohio Ethics Commission at (614) 466-7090 or
visit the Commission's web site: ethics.ohio.gov*