AO 10
Rev. 1/2015

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2024

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)	2. Court or Organization	3. Date of Report
Helmick, Jeffrey J.	U.S. District Court - Northern District of Ohio	08/11/2025
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)	**5a. Report Type (check appropriate type)**	**6. Reporting Period**
U.S. District Judge - Active Status	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
1716 Spielbusch Avenue, Suite 480 Toledo, Ohio 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.		

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see pp. 17-24 of filing instructions.)*

A. Filer's Non-Investment Income

☑ NONE *(No reportable non-investment income.)*

	DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1.			
2.			
3.			
4.			

B. Spouse's Non-Investment Income - *If you were married during any portion of the reporting year, complete this section.*

(Dollar amount not required except for honoraria.)

☑ NONE *(No reportable non-investment income.)*

	DATE	SOURCE AND TYPE
1.		
2.		
3.		
4.		

IV. REIMBURSEMENTS *-- transportation, lodging, food, entertainment.*

(Includes those to spouse and dependent children; see pp. 25-27 of filing instructions.)

☑ NONE *(No reportable reimbursements.)*

	SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.					
2.					
3.					
4.					
5.					

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Helmick, Jeffrey J.	08/11/2025

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.	Fifth Third Bank Mastercard	Credit Card	None
2.	American Express Gold	Credit Card	K
3.	Chase Prime Visa	Credit Card	J
4.	American Express Delta	Credit Card	J
5.	Discover	Credit Card	None
6.	Capital One	Credit Card	J
7.	Chase Freedom Visa	Credit Card	None
8.	American Express Optima	Credit Card	J
9.	American Express Skymiles Reserve	Credit Card	J
10.			

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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 (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	D. (5) Identity of buyer/seller (if private transaction)
1. TRUST #1 - [redacted] (H)									
2. -iShares Core S&P 500 ETF	B	Dividend	L	T					
3. -iShares Core S&P 500 ETF	B	Dividend			Sold (part)	03/13/24	J	C	
4. -Alphabet Inc (Google) Stock	A	Dividend	L	T					
5. -Amazon Com Inc Stock	A	Dividend	L	T					
6. -American Water Works Co. Stock	A	Dividend	J	T					
7. -Apple Inc Stock	A	Dividend	L	T					
8. -CME Group Inc Stock	A	Dividend	K	T					
9. -Cincinnati Financial Group Stock	A	Dividend	J	T					
10. --Honeywell Int Inc Stock	A	Dividend	J	T					
11. -JP Morgan Chase & Co Stock	A	Dividend	K	T					
12. -McDonalds Corp Stock	A	Dividend	K	T					
13. -Microsoft Corp Stock	A	Dividend	M	T					
14. -Oracle Corp Stock	A	Dividend	K	T					
15. -Qualcomm Inc Stock	A	Dividend	K	T					
16. -Rockwell Automation Inc Stock	A	Dividend	K	T					
17. -Pepsico Inc Stock	A	Dividend			Sold (part)	12/02/24	J	A	

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

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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 (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	D. (5) Identity of buyer/seller (if private transaction)
18. -Pepsico Inc Stock	A	Dividend			Sold	12/12/24	J	D	
19. -Pfizer Inc Stock	A	Dividend			Sold	03/13/24	J	A	
20. -RTX Corp Stock	A	Dividend			Sold	03/13/24	J	B	
21. -Fidelity Government Cash Reserves	A	Int./Div.	J	T					
22.									
23. TRUST #2[redacted](H)									
24. -Alphabet Inc (Google) Stock	A	Dividend	L	T					
25. -Apple Inc Stock	A	Dividend	L	T					
26. -Dodge & Cox Int'l Stock Fund	A	Dividend	K	T					
27. -Intel Corp Stock	A	Dividend	J	T					
28. -iShares Core MSCI EAFE EFT	C	Dividend	L	T					
29. -iShares Core S&P 500 ETF (formerly S&P 500 Index Fund	A	Dividend	L	T					
30. iShares Core S&P MID-CAP ETF	A	Dividend	L	T					
31. -iShares Core S&P SMALL-CAP ETF	A	Dividend	K	T					
32. -iShares MSCI USA	A	Dividend	K	T					
33. -Neuberger Berman Emer Mkst Eqty	A	Dividend	J	T					
34. -Vanguard FTSE Emerging Markets Fund	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less
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C =$2,501 - $5,000
D =$5,001 - $15,000
E =$15,001 - $50,000
F =$50,001 - $100,000
G =$100,001 - $1,000,000
H1 =$1,000,001 - $5,000,000
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2. Value Codes (See Columns C1 and D3)
J =$15,000 or less
K =$15,001 - $50,000
L =$50,001 - $100,000
M =$100,001 - $250,000
N =$250,001 - $500,000
O =$500,001 - $1,000,000
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3. Value Method Codes (See Column C2)
Q =Appraisal
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☐ 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 (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	D. (5) Identity of buyer/seller (if private transaction)
35. -Doubleline Total Return Bond Fund	A	Interest	K	T					
36. -KT Short Term Tax-Free Fund	D	Int./Div.	M	T					
37. -Western Asset Core Plus Bond	A	Interest	K	T					
38. -KT Short Term Deposit/Investment Fund	A	Int./Div.	K	T					
39.									
40. DEFERRED COMP #1 (H)									
41. -Fidelty Contrafund CP (formerly Fidelity Contrafund)	F	Int./Div.	M	T					
42. -US Bond	A	Int./Div.	J	T					
43. -Stable Value Option	B	Int./Div.	K	T					
44. -Vanguard Capital Opportunity Stock Fund	D	Dividend	K	T					
45. -US Small Value Comp Stock	A	Int./Div.	K	T					
46. -US Large Value Comp Stock	D	Int./Div.	L	T					
47.									
48. IRA #1(H)									
49. -Fidelity Government Cash Reserves	A	Dividend	J						
50. -Fidelity JSCI Consumber Staples	A	Dividend	J	T					
51. -Fidelity MSCI Energy Index ETF	A	Dividend	J	T					

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2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	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	
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52. -Fidelity MSCI FINLS Index EFT	A	Dividend	J	T					
53. -Fidelity MSCI INDL Index ETF	A	Dividend	J	T					
54. -Fidelity MSCI UTILS Index ETF	A	Dividend	J	T					
55. -Fidelity MSCI MATLS Index ETF	A	Dividend	J	T					
56. -iShares Core S&P MID-CAP ETF	A	Dividend	J	T					
57. -iShares Core S&P SMALL_CAP E	A	Dividend	J	T					
58. -SPDR Portfolio S&P 500 ETF	A	Dividend	J	T					
59. -Vanguard World FD Consum Dis ETF	A	Dividend	J	T					
60. -Vanguard World FD Health Car ETF	A	Dividend	J	T					
61. -Vanguard World FD Inf Tech ETF	A	Dividend	J	T					
62. -Vanguard World FD Comm Srvc ETF	A	Dividend	J	T					
63. -First TR Exchange-Traded FD	A	Dividend	J	T					
64. -Powershares Actively Managed Total Return	A	Dividend	J	T					
65. -iShares TR ISHS 1-5yr Invs	A	Dividend	J	T					
66. -JP Morgan Exchange Traded FD Intl BD	A	Dividend	J	T					
67. -Janus Henderson Short Duration Income ETF	A	Dividend	J	T					
68. -SSGA Active ETF TR Blackstone SENR	A	Dividend	J	T					

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69.									

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

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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/ Jeffrey J. Helmick

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
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Washington, D.C. 20544