# 2024 Form 6 - Full and Public Disclosure of Financial Interests

**Filed with COE: 05/27/2025**

## General Information

Name: Hon John M Legg

**PID 14669**

**AGENCY INFORMATION**

| Organization | Suborganization | Title |
|---|---|---|
| Pasco County School District | Elected Constitutional Officer | |

## Net Worth

My Net Worth as of May 23, 2025 was $ 724,306.65.

## Assets

Household goods and personal effects may be reported in a lump sum if their aggregate value exceeds $1,000. This category includes any of the following, if not held for investment purposes: jewelry; collections of stamps, guns, and numismatic items; art objects; household equipment and furnishings; clothing; other household items; and vehicles for personal use, whether owned or leased.

The aggregate value of my household goods and personal effect is $ 133,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER $1,000:

| Description of Asset | Value of Asset |
|---|---|
| Home - 10217 Palladio Drive, New Port Richey, FL. 34655 | $ 625,000.00 |
| Wells Fargo Bank Account | $ 8,123.42 |
| 401k Retirement- Nationwide | $ 156,701.06 |
| See Attached | |

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## Liabilities

LIABILITIES IN EXCESS OF $1,000:

| Name of Creditor | Address of Creditor | Amount of Liability |
|---|---|---|
| Wells Fargo | PO Box 14411, Des Moines, IA 50306 | $ 158,425.89 |
| Hyundai Motor Finance | PO Box 650805 | $ 38,645.97 |

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

| Name of Creditor | Address of Creditor | Amount of Liability |
|---|---|---|
| N/A | | |

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## Income

Identify each separate source and amount of income which exceeded $1,000 during the year, including secondary sources of income. Or attach a complete copy of your 2024 federal income tax return, including all W2s, schedules, and attachments. Please redact any social security or account numbers before attaching your returns, as the law requires these documents be posted to the Commission's website.

☐ I elect to file a copy of my 2024 federal income tax return and all W2s, schedules, and attachments.

PRIMARY SOURCES OF INCOME:

| Name of Source of Income Exceeding $1,000 | Address of Source of Income | Amount |
|---|---|---|
| Pasco County School District | 7227 Land O Lakes Blvd. Land O' Lakes Fl. 34638 | $ 19,456.00 |
| Creation Foundation DBA Dayspring Academy | 9732 Little Road, NPR, FL 34655 | $ 118,387.00 |

SECONDARY SOURCES OF INCOME (Major customers, clients, etc. of businesses owned by reporting person):

| Name of Business Entity | Name of Major Sources of Business' Income | Address of Source | Principal Business Activity of Source |
|---|---|---|---|
| N/A | | | |

## Interests in Specified Businesses

| Business Entity # 1 |
|---|
| N/A |

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## Training

This section applies only to a Constitutional or elected municipal officer, each of whom are required to complete annual ethics training pursuant to Section 112.3142, F.S.

☐ I certify that I have completed the required training under Section 112.3142, F.S.

☑ Required training under Section 112.3142, F.S., not applicable to filer for this form year.

## Signature of Reporting Official or Candidate

Under the penalties of perjury, I declare that I have read the foregoing Form 6 and that the facts stated in it are true.

***John M Legg***

Digitally signed: **05/27/2025**

**Filed with COE: 05/27/2025**

# My Portfolio

Change Investments

BALANCES | CURRENT ELECTIONS | INVESTMENT RESULTS

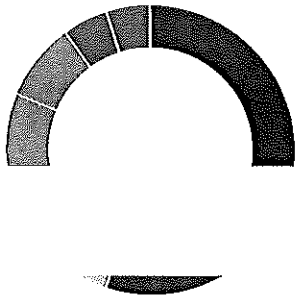
## Balances as of 05/23/2025

Total Balance
**$156,701.06**

Vested Balance
**$156,701.06**

| Investments | Contribution Types | Asset Class |
|---|---|---|

### Investments



Nationwide®

| | |
|---|---|
| Msif Glbl Oppr I | **55.11%** |
| Vngrd Strat EQ Inv | **13.54%** |
| DFA US Trgt Val Inst | **12.65%** |
| Fidadv Tech Inst | **8.72%** |
| Nw Infl Prtct Sec Inst Svc | **5.09%** |
| Other | **4.89%** |

## Investment Details

Show Contribution Types

Print Table

**Msif Glbl Oppr I**
**TICKER/CUSIP: MGGIX**

| | |
|---|---|
| Docs | |
| Asset Class | International Stocks |
| Units | 25,274.292 |
| Price | $3.416<br>05/23/2025 |
| Balance | $86,345.69 |
| QTD Change | ↑ $9,002.75 |
| YTD Change | ↑ $9,407.62 |

Show Contribution Types

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**Vngrd Strat EQ Inv**
**TICKER/CUSIP: VSEQX**

| | |
|---|---|
| Docs | |
| Asset Class | Mid Cap Stocks |
| Units | 4,867.401 |
| Price | $4.360<br>05/23/2025 |
| Balance | $21,220.57 |
| QTD Change | ↑ $639.64 |
| YTD Change | ↓ $231.48 |

Show Contribution Types

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**DFA US Trgt Val Inst**
**TICKER/CUSIP: DFFVX**

| | |
|---|---|
| Docs | |
| Asset Class | Small Cap Stocks |
| Units | 6,519.196 |
| Price | $3.040<br>05/23/2025 |
| Balance | $19,819.99 |
| QTD Change | ↓ $60.01 |
| YTD Change | ↓ $1,012.91 |

Show Contribution Types

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**Fidadv Tech Inst**
**TICKER/CUSIP: FATIX**

| | |
|---|---|
| Docs | |
| Asset Class | Specialty |
| Units | 1,377.812 |
| Price | $9.922<br>05/23/2025 |
| Balance | $13,670.07 |
| QTD Change | ↑ $1,286.18 |
| YTD Change | ↓ $542.98 |

Show Contribution Types

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**Nw Infl Prtct Sec Inst Svc**
**TICKER/CUSIP: NWXNX**

| | |
|---|---|
| Docs | |
| Asset Class | Bonds |
| Units | 7,065.741 |
| Price | $1.129<br>05/23/2025 |
| Balance | $7,979.47 |
| QTD Change | ↓ $94.04 |
| YTD Change | ↑ $568.77 |

Show Contribution Types

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**Fidadv Invmt Grd Bd Inst**
**TICKER/CUSIP: FGBPX**

| | |
|---|---|
| Docs | |
| Asset Class | Bonds |
| Units | 3,288.431 |
| Price | $1.201<br>05/23/2025 |
| Balance | $3,950.50 |
| QTD Change | ↓ $45.69 |
| YTD Change | ↑ $245.22 |

Show Contribution Types

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**Nw Bd Indx R6**
**TICKER/CUSIP: GBXIX**

| | |
|---|---|
| Docs | |
| Asset Class | Bonds |
| Units | 3,271.659 |
| Price | $1.135<br>05/23/2025 |
| Balance | $3,714.77 |
| QTD Change | ↓ $49.87 |
| YTD Change | ↑ $230.33 |

Show Contribution Types

| | |
|---|---|
| **Total Balance** | **$156,701.06** |
| **Total QTD Change** | **↑ $10,678.96** |
| **Total YTD Change** | **↑ $8,664.57** |

Change Investments

‡ Denotes Fund Window Vehicles

The figures above represent past performance and do not guarantee future results. Current performance may be lower or higher than the performance data quoted. Please keep this in mind as you evaluate each fund.

In addition to this information, you can learn about fund risks, investment objectives and associated charges in each fund's prospectus, which is available below or by calling 1-888-867-5175.

When reading fund fact sheets, also read the Investment Profile User's Guide (PDF) for a more complete picture of funds and for information about how to use Morningstar data.

Balances and prices are subject to nightly account updates.

Your Personal Rate of Return is calculated with a time-weighted formula, widely used by financial analysts to calculate investment earnings. The calculated value reflects the result of your investment selections as well as any activity in the plan accounts shown. Other personal rate of return formulas may yield different results. Remember, past performance is no guarantee of future results.

The RIA has the fiduciary responsibility for the asset allocation models. The asset allocation models and percentages in each were developed by your RIA, which is independent of Nationwide. None of the above information constitutes a recommendation or offer of a security or investment advice by Nationwide. Nationwide is not responsible for the composition or performance of the asset allocation models.

Gross expense ratios represent the fund's total operating expenses as a percentage of the assets held in the fund. For more information about gross expense ratios, read the fund's prospectus.

** The money market current yield is the annualized historical yield for the 7-day period ending on the last day of the calendar quarter. Yield quotation more closely reflects the current earnings of the money market fund than the total return quotation.

Collective Investment Funds (CIFs) are typically only available to qualified plans and certain governmental 457 plans through banks or trust companies. Unlike mutual funds which must register with the U.S. Securities and Exchange Commission, CIFs are considered trusts subject to regulation by federal banking authorities and state trust law. The funds are maintained as an administrative convenience to the bank in a manner incidental to the bank's trust activities and not primarily for investment. You should note that because the CIFs are not retail options, investment performance should not be compared to the mutual fund performance. Before investing, understand that CIFs are not insured by the FDIC, NCUSIF, or any other Federal government agency; are not deposits or obligations of, guaranteed by, or insured by, the depository institution where offered or any of its affiliates; involve investment risk including possible loss of value. CIFs receive no Morningstar ratings.

This change in net assets is based only on the current charges being applied to all historical time periods and does not include any other fees or expenses including termination charges, market value adjustments, plan or participant fees, or trust fees, if applicable. Any such fees and charges, if applicable, would lower the performance shown. For more information regarding the expenses, contact your plan's representative. **Please consider the funds' investment objectives, risks, charges and expenses by reviewing the prospectuses before investing.** Nationwide Financial® and its subsidiaries are not making any recommendations regarding these underlying funds.

A fund's performance is compared to an index benchmark, which is intended to represent the index that most closely reflects the composition of the fund and is selected by Nationwide. Market indices are unmanaged and no fees or expenses have been reflected. Index performance does not provide an indicator of how individual investments performed in the past or how they will perform in the future. Individuals cannot purchase or invest directly in an index.

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The Morningstar Rating is based on historical risk-adjusted return as of a specific date, which is calculated by subtracting a risk penalty from total return, after accounting for all sales charges, loads, and redemption fees. The penalty is determined by the amount of variation in monthly returns, within emphasis on downward variation. The greater the variation, the larger the penalty. Keep in mind that the rating is based solely on historical performance and is no guarantee of future results. The Overall Rating is a weighted average of the fund's 3-, 5- and 10- year Morningstar rating as applicable. Investments are ranked within their Morningstar Categories by their risk-adjusted return and assigned stars using the following distribution: the top 10% receive 5 stars, the next 22.5% 4 stars, the middle 35% 3 stars, the next 22.5% 2 stars, and the bottom 10% receive 1 star.

Rather than choosing investments according to their ratings, investors should first decide on an overall portfolio strategy and then seek the best investments for each portion of their portfolio. The Morningstar Rating can then be used to identify possible candidates, but you should never make a buy or sell based solely on the rating.

Nationwide Group Retirement Series includes unregistered group fixed and variable annuities and trust programs. The unregistered group fixed and variable annuities are issued by Nationwide Life Insurance Company, Columbus, Ohio. Trust programs and trust services are offered by Nationwide Trust Company, FSB. Nationwide Investment Services Corporation, member FINRA. Retail mutual funds are made available for purchase in the Nationwide Group Retirement Program. The investment objectives and policies of certain variable annuity portfolios may be similar to those of other funds managed by the same investment adviser. No representation is made, and there can be no assurance given, that any of the portfolios' investment results will be comparable to the investment results of any other fund, including other funds with the same investment adviser or manager. The portfolios' investment results may be expected to differ, and may be higher or lower than the investment results of such other funds.

**Fund risk disclosures**

**Money market funds: An investment in the fund is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other federal government agency. Although the fund seeks to preserve the value of your investment at $1 per share, it is possible to lose money by investing in the fund.**

International/Emerging Markets Funds: Investing internationally involves risks not associated with investing solely in the U.S., such as currency fluctuation, political risk, differences in accounting and the limited availability of information.

**Small Company Funds:** Stocks of small or emerging companies may have less liquidity than those of larger, established companies and may be subject to greater price volatility and risk than the overall stock market.

**High Yield Bond Funds:** Portfolios that invest in high-yield securities are subject to greater credit risk and price fluctuations than portfolios that invest in higher-quality securities.

**Non-Diversified Funds:** Funds that concentrate in a specific sector or focus on a relatively small number of securities may be subject to greater volatility than a more diversified investment.

**Government Bond Funds:** While the fund invests primarily in the securities of the U.S. government and its agencies, the fund's value is not guaranteed by these entities.

**Real Estate Funds:** Real estate investing entails the risks of real estate business generally, including sensitivity to economic and business cycles, changing demographic patterns and government actions.

The Investor Destinations Funds are designed to provide diversification and asset allocation across several types of investments and asset classes, primarily by investing in underlying funds. Therefore, in addition to the expenses of the Investor Destinations Funds, you are indirectly paying a proportionate share of the applicable fees and expenses of the underlying funds.

Target Maturity Funds are designed to provide diversification and asset allocation across several types of investments and asset classes, primarily by investing in underlying funds. Therefore, in addition to the expenses of the Target Maturity Funds, an investor is indirectly paying a proportionate share of the applicable fees and expenses of the underlying funds. Target Maturity Funds are designed for people who plan to withdrawal funds during or near a specific year. These funds use a strategy that reallocates equity exposure to a higher

percentage of fixed investments over time. As a result, the funds become more conservative as they approach retirement. It's important to remember that no strategy can assure a profit or prevent a loss in a declining market. A target-date fund's principal value is not guaranteed at any time, including the target date designated in the fund's name.

**Not a deposit • Not FDIC or NCUSIF insured • Not guaranteed by the institution • Not insured by any federal government agency • May lose value**

Ticker symbols are provided to help you research mutual funds. Information related to pricing or performance of these funds published in publicly available media such as newspapers and websites may be different than performance data and pricing specific to your employer-sponsored retirement plan. This is partially due to the additional fees and expenses associated with your plan. You should avoid making a direct comparison between a publicly available fund and a fund offered to you within your plan. A ticker symbol listed as "N/A" indicates the investment option is not a publicly traded mutual fund. To find pricing or performance related information specific to your account visit the Investment Info tab on your plan's website.

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