PERSONAL FINANCIAL DISCLOSURE 2019

for candidates, members of the senate, and employees

RECEIVED
Jun 04 2019
SENATE
State of Iowa

Name

Wahls	Zacharia	P
(Last)	(First)	(Middle Initial)

zach.wahls@legis.iowa.gov
(Email)

Please list each business, occupation, or profession in which you are engaged. In listing the business, occupation, or profession, it is not necessary that your employer or the name of the business be listed, although all businesses, occupations, or professions must be listed, regardless of the amount of income derived or time spent participating in the activity. (Examples of types of business, occupations, or professions that may be listed: teacher, lawyer, legislator, real estate agent, insurance adjuster, salesperson....)

(1) Legislator
(2) Wahls Enterprises LLC
(3) Zach Wahls LLC
(4) RDT LLC
(5) Consultant for University of Iowa Community Credit Union

Please list the nature of each of the businesses, occupations, or professions which you listed above, unless the nature of the business, occupation, or profession is already apparent from the information indicated above. The descriptions in this paragraph should correspond by number to the numbers for each of the businesses, occupations, or professions listed above. (Examples: If you indicated, for example, that you were a salesperson in box (1) above, you should list in box (1) of this section the types of goods or services sold. If you indicated that you were a teacher in box (2) above, you should indicate in box (2) of this section the type of school or institution in which you provide instruction or whether the instruction is provided on a private basis. If you indicated that you were a lawyer in box (3) above, you should indicate your areas of practice and whether you are in private, corporate, or government practice in box (3) of this section. If you indicated in box (4) above that you were a consultant, in box (4) of this section you should indicate the kind of services provided and types of clients served.

(1) Legislator: I am a state senator.
(2) Wahls Enterprises LLC primarily engages in the design, manufacturing, distribution, and direct sale of customized playing cards.
(3) Zach Wahls LLC is the entity I use to categorize my writing and public speaking income.
(4) RDT LLC is my family farm, in which I am a minority owner.
(5) Consultant for University of Iowa Community Credit Union; in this capacity I am conducting research to help UICCU identify opportunities to better serve its low- and moderate-income members.

Please list each source, by general description, from which you receive, or which generates, more than one thousand dollars in gross annual income in the categories listed below. For purposes of this item, a source produces gross annual income if the revenue produced by the source is subject to federal or state income taxes. In completing this item, it is not necessary to list the name of the company, business, financial institution, corporation, partnership, or other entity which constitutes the source of the income and the amount or value of the holding should not be listed.

(1) Securities (Here, for example, you need not state that you own x number of shares of any specific company by brand or corporate name, or that the stock is of a certain value, but may instead state that you possess stock

in a company and indicate the nature of the company's business.):

The bulk of my personal investment and retirement investment are invested in the Vanguard Target Retirement 2060 Fund, a low-cost index fund.

(2) Instruments of Financial Institutions (You need not indicate, for example, in which institutions you hold certificates of deposit that produced annual income over the one thousand dollars threshold, but simply listing the nature of the institution will suffice, e.g., bank, credit union, or savings and loan association.):

Nothing to Report

(3) Trusts (The name of the particular trust need to be listed. However, if the income is received from a charitable trust/foundation, such as the Pugh Charitable Trust, in the form of a grant, the fact that the trust is a charitable trust should be noted here.):

Nothing to Report

(4) Real Estate (When listing real estate, it is not necessary to list the location of the property, but the general nature of the real estate interest should be indicated, e.g., residential leasehold interest or farm leasehold interest.):

I am a part-owner in RDT LLC, which owns the land of my family farm.

(5) Retirement Systems (When listing retirement benefits, it is not necessary to list the name of the particular pension system or company, but rather the type of benefit should be listed, e.g., health benefits, life insurance benefits, private pension, or government pension.):

IPERS, eventually.