FORM 6 — FULL AND PUBLIC DISCLOSURE OF FINANCIAL INTERESTS — 2015

Please print or type your name, mailing address, agency name, and position below:

FOR OFFICE USE ONLY: 201384

FLORIDA COMMISSION ON ETHICS
AUG 01 2016
RECEIVED

PROCESSED

LAST NAME — FIRST NAME — MIDDLE NAME:
Montgomery Robert B

MAILING ADDRESS:
657 E Romana St.

CITY: Pensacola ZIP: 32563 COUNTY: Escambia

NAME OF AGENCY:
Northwest Florida Transportation Corridor Authority

NAME OF OFFICE OR POSITION HELD OR SOUGHT:
Chairman

CHECK IF THIS IS A FILING BY A CANDIDATE ☐

PART A -- NET WORTH

Please enter the value of your net worth as of December 31, 2015 or a more current date. [Note: Net worth is not calculated by subtracting your *reported* liabilities from your *reported* assets, so please see the instructions on page 3.]

My net worth as of December 31, 2015 was $ 11,750.225.

PART B -- ASSETS

HOUSEHOLD GOODS AND PERSONAL EFFECTS:

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 effects (described above) is $ 150.000

ASSETS INDIVIDUALLY VALUED AT OVER $1,000:

DESCRIPTION OF ASSET (specific description is required - see instructions p.4)	VALUE OF ASSET
Schedule Attached	13,032,446.70

PART C -- LIABILITIES

LIABILITIES IN EXCESS OF $1,000 (See instructions on page 4):

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY
Schedule Attached	1,437,221.05

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY

PART D -- 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 2015 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 2015 federal income tax return and all W2's, schedules, and attachments.
[If you check this box and attach a copy of your 2015 tax return, you need not complete the remainder of Part D.]

PRIMARY SOURCES OF INCOME (See instructions on page 5):

NAME OF SOURCE OF INCOME EXCEEDING $1,000	ADDRESS OF SOURCE OF INCOME	AMOUNT
Schedule Attached		441,846

SECONDARY SOURCES OF INCOME [Major customers, clients, etc., of businesses owned by reporting person--see instructions on page 5]:

NAME OF BUSINESS ENTITY	NAME OF MAJOR SOURCES OF BUSINESS' INCOME	ADDRESS OF SOURCE	PRINCIPAL BUSINESS ACTIVITY OF SOURCE

PART E -- INTERESTS IN SPECIFIED BUSINESSES [Instructions on page 6]

	BUSINESS ENTITY # 1	BUSINESS ENTITY # 2	BUSINESS ENTITY # 3
NAME OF BUSINESS ENTITY	Schedule Attached		
ADDRESS OF BUSINESS ENTITY			
PRINCIPAL BUSINESS ACTIVITY			
POSITION HELD WITH ENTITY			
I OWN MORE THAN A 5% INTEREST IN THE BUSINESS			
NATURE OF MY OWNERSHIP INTEREST			

PART F - TRAINING

For officers required to complete annual ethics training pursuant to section 112.3142, F.S.

☑ **I CERTIFY THAT I HAVE COMPLETED THE REQUIRED TRAINING.**

OATH

I, the person whose name appears at the beginning of this form, do depose on oath or affirmation and say that the information disclosed on this form and any attachments hereto is true, accurate, and complete.

Robert Montgomery

SIGNATURE OF REPORTING OFFICIAL OR CANDIDATE

STATE OF FLORIDA
COUNTY OF Santa Rosa

Sworn to (or affirmed) and subscribed before me this 28th day of June, 2016 by Robert Montgomery.

Sandra Merritt
(Signature of Notary Public--State of Florida)

(Print, Type, or Stamp Commissioned Name of Notary Public)

Personally Known ✓ OR Produced Identification ____

Type of Identification Produced ____

Sandra Merritt
NOTARY PUBLIC
STATE OF FLORIDA
Comm# FF964266
Expires 4/6/2020

If a certified public accountant licensed under Chapter 473, or attorney in good standing with the Florida Bar prepared this form for you, he or she must complete the following statement:

I, _____, prepared the CE Form 6 in accordance with Art. II, Sec. 8, Florida Constitution, Section 112.3144, Florida Statutes, and the instructions to the form. Upon my reasonable knowledge and belief, the disclosure herein is true and correct.

Signature _____ Date _____

Preparation of this form by a CPA or attorney does not relieve the filer of the responsibility to sign the form under oath.

IF ANY OF PARTS A THROUGH E ARE CONTINUED ON A SEPARATE SHEET, PLEASE CHECK HERE ☐

Robert B Montgomery
Attached to Statement of Financial Interests
Part B - Assets

Cash on Hand		150,000.00
Stocks and Bonds		
800 East Developers, LLC	Entity that owns Donahue's property, 2 acres, 1/3 interest	800,000.00
Cox Ventures V	Chan's Wine World, Destin, 50% interest	3,000,000.00
	Chan's Wine World, Panama City	
Wineworld Outlet, LLC	Retail Liquor Stores in San Destin	800,000.00
Wineworld 30A	Liquor Store Watercolor, 33.5% interest	1,000,000.00
Aragon Land Trust, LLC	Owns Privateer's Alley property in Aragon 33% interest	100,000.00
BB&T	Stock Account	97,000.00
Sun Trust	Common Stock	36,000.00
Straus Greenburg	REIT-New Orleans apartment complex	50,000.00
EZRA	Medical Supply Company	25,000.00
Woodland Run East, Inc.	Apartment Complex	1,100,000.00
		7,158,000.00
Real Estate		
612 E Romana	Residence	1,200,000.00
657 E Romana	Offie building	450,000.00
Aragon Lot 1	Residential building	495,000.00
Aragon 12		150,000.00
3701 Ceylon Drive, Gulf Breeze	Two acre waterfront lot in Tiger Point	1,000,000.00
3370 Greenbriar, Gulf Breeze	Triplex apartment	260,000.00
3112 Woods Way, Gulf Breeze	Warehouse	80,000.00
935 Barracks Street, New Orleans	French Quarter apartment	350,000.00
Liberty Springs Farm, Pensacola	Appx. 90 ac. + assorted vacant lots-50% interest	750,000.00
Mahogany Mill Road	Unfinished res. Unit and 2 boat slips	100,000.00
7979 Gulf Blvd Unit 192, Navarre Beach	Gulf Front Penthouse Condo	600,000.00
		5,435,000.00

Notes Receivable		
Chan Cox	Secured by his 50% interest in MCP, Cox Ventures V and Cox Ventures VI	$310,000.00
John Acker	Note due March 2016	$125,000.00
Matt Munlyn	111 N B St	$4,446.70
		439,446.70
TOTAL		13,032,446.70

Robert B. Montgomery

Attached to Statement of Financial Interest

Part C - Liabilities

PAYABLES

BANK	ACCOUNT #	SECURITY	AMOUNT
BB&T	[redacted]	612 E Romana, includes taxes	$602,000.00
Service First	[redacted]	657 E Romana	$134,058.39
Servis First		659 E Romana	$375,000.00
Coastal Bank & Trus	[redacted]	Gulf Blvd-Navarre summer renta	$76,535.00
Warrington Bank		Tiger point Lot	$249,627.66
		TOTAL PAYABLES	**$1,437,221.05**

Robert B. Montgomery
Attached to Statement of Financial Interests
Part D - Primary Sources of Income

Name of Source of Income	Source's Address	Amount
Cox Ventures V, Inc. dba Chan's Wine World, Destin	PO Box 17129 Pensacola, FL 32522	23,090
Wine World Outlet, LLC	10859 US Hwy 98, Suite 301 Miramar Beach, FL 32550	129,201
Wine World 30A, LLC	10859 US Hwy 98, Suite 301 Miramar Beach, FL 32550	178,973
Woodland Run East, Inc	3100-1 Woods Way Gulf Breeze, FL 32563	90,033
Chan Cox	PO Box 17129 Pensacola, FL 32522	20,543
TOTAL		441,840

Robert B. Montgomery
Attached to Statement of Financial Interests
Part E - Interest in Specified Business

	Business Entity #1	Business Entity #2	Business Entity #3
Name of Business Entity	Cox Ventures V, Inc	Wine World Outlet, LLC	Wine World 30A, LLC
Address of Business Entity	P.O. Box 17129	10859 US Highway 98, Suite 301	10859 Highway 98, Suite 301
	Pensacola, FL 32522	Miramar Beach, FL 32550	Miramar Beach, FL 32550
Principal Business Activity	Liquor Store	Liquor Store	Liquor Store
Position Held with Company	Shareholder	Member	Member
I Own More Than a 5% Interest in the Business	50% Owner	25% Owner	33.33% Owner
Nature of My Ownership Interest	Shareholder	Member	Member