

FORM 6**FULL AND PUBLIC DISCLOSURE
OF FINANCIAL INTERESTS****2018**Please print or type your name, mailing
address, agency name, and position below:

FOR OFFICE USE ONLY:

LAST NAME — FIRST NAME — MIDDLE NAME:

GAETZ, DONALD JAY

MAILING ADDRESS:

P.O. BOX 4706

CITY:

SEASIDE

ZIP:

32459

COUNTY:

WALTON

NAME OF AGENCY:

TRIUMPH GULF COAST

NAME OF OFFICE OR POSITION HELD OR SOUGHT:

BOARD MEMBER

CHECK IF THIS IS A FILING BY A CANDIDATE ☐22814
PROCESSEDFLORIDA
COMMISSION ON ETHICS

JUL 01 2019

RECEIVED

PART A — NET WORTHPlease enter the value of your net worth as of December 31, 2018 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 June 28, 20 19 was \$ 28,313,853.**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 \$ _____

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

DESCRIPTION OF ASSET (specific description is required - see instructions p.4)	VALUE OF ASSET
SEE ATTACHMENT A	28,326,269

PART C — LIABILITIES**LIABILITIES IN EXCESS OF \$1,000 (See instructions on page 4):**

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY
SEE ATTACHMENT A	12,416

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 2018 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 2018 federal income tax return and all W2's, schedules, and attachments.
[If you check this box and attach a copy of your 2018 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
SEE ATTACHMENT B		886,627

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
SEE ATTACHMENT C			

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

	BUSINESS ENTITY # 1	BUSINESS ENTITY # 2	BUSINESS ENTITY # 3
NAME OF BUSINESS ENTITY			
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.

STATE OF FLORIDA
COUNTY OF OKALOOSA

Sworn to (or affirmed) and subscribed before me this 28th day of

July, 20 19 by Donald Jay Gaetz

Renae Richey
(Signature of Notary Public--State of Florida)

RENAE RICHEY
(Print, Type, or Stamp Commissioned Name of Notary Public)
Notary Public - State of Florida
Commission # GG 067006
My Comm. Expires Jan 29, 2021
Bonded through National Notary Assn.

Personally Known ☒ OR Produced ☐

Type of Identification Produced NA

[Signature]
SIGNATURE OF REPORTING OFFICIAL OR CANDIDATE

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, Heather Jourdan, 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] CPA
Signature

6/28/2019
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 ☒

Attachment A:
Financial Statement/Don Gaetz
June 28, 2019

Securities:

AT and T	\$	8,776
Bank of America		37,878
Charter Communications		9,043
CIGNA		6,957
Coca Cola		151,810
Eli Lilly		70,955
Intel		13,212
Pfizer		29,064
AB Municipal Income Fund		43,004
Alliance Bernstein Municipal Income A		153,479
Power Shares QQQ Trust SE		56,534
Abbott Labs		2,893
AbbVie		537
Adobe Systems		3,792
Advance Auto		2,015
Air Products		4,275
Akamai Technologies		2,788
Alexion Pharmaceuticals		2,160
Alibaba		1,791
Alphabet Inc CLC		3,311
Alphabet Inc CLA		3,320
Altria Group		883
Amazon		8,875
American Express		2,524
Amgen		1,834
Anheuser-Busch InBev		2,442
Apple		2,801
Automatic Data Processing		2,082
BB and T		4,535
Biogen		3,234
Biomarin Pharmaceuticals		1,645
Blackrock		4,571
Broadcom		1,258
CH Robinson		796
Caterpillar		1,917
Chevron		3,188
Chipotle		1,980
Cisco Systems		6,348
Comcast		4,879
Costco		2,396
Crown Castle REIT		3,900
Disney		3,301

Securities Continued...

Ecolab	2,577
Equinix	2,915
Eversource Energy	443
Exxon Mobil	1,486
Facebook	6,211
Home Depot	7,214
Honeywell International	7,558
HP Inc	953
Illinois Tool Works	1,815
Johnson and Johnson	5,639
JP Morgan Chase	5,616
Lockheed Martin	4,401
Lyondell Basell	1,485
Marsh and McLennan	2,868
Maxim Integrated	1,262
Grubhub	1,303
HIS Market	2,182
Linde PLC	1,986
McCormick	1,404
McDonalds	4,957
Medtronic	2,870
Microsoft	11,997
Nextera	5,946
Oracle	2,631
Palo Alto Networks	2,001
Paychex	4,290
PayPal	2,195
PepsiCo	4,224
Pfizer	3,114
Phillips 66	1,131
Pioneer Natural	1,704
QualComm	2,205
Realty INCM Corp	2,243
Red Hat	1,474
Charles Schwab	2,663
Sempra Energy	3,155
Simon Property Group	2,756
Splunk	1,710
Texas Instruments	7,302
Thermo Fisher Scientific	2,937
United Parcel	4,352
US Bancorp	2,510
Valero Energy	1,267
VISA	5,485
Sysco	413
Starbucks	3,575
Mondelez	2,339

Securities Continued...

Nutanix	1,039
Uber	969
NVIDIA	1,355
Okeok	699
VM Ware	1,239
WW Grainger	2,617
WEC Energy	3,061
Williams Companies	1,556
Zoetis	2,829
3M	1,278
First Florida Bank **	817,000
Treveron, Inc. **	832,541
Caregivers, Inc. **	2,200,000
Matterin, Inc. **	1,230,000
Oppenheimer Funds 403 (b)	110,132
American Funds IRA	324,635
Blackrock Investment Fund	1,142,239
T. Rowe Price Deferred Comp Fund	38,443

*** non-marketable securities of closely held entities*

Subtotal Securities

\$	7,537,379
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Cash and Cash Equivalents

Merrill Lynch, Pensacola, FL (trading account closing cash)	\$ 79,208
Bank of America, Niceville, FL (trading account closing cash)	87,017
Goldman Sachs, New York, NY (CD)	96,903
Comenity Bank, Wilmington, DE (CD)	200,574
Goldman Sachs BK, New York, NY (CD)	200,574
Morgan Stanley BK, Salt Lake City, UT (CD)	200,574
Sallie Mae Bank, Salt Lake City, UT (CD)	200,574
Synchrony Bank, Draper, UT (CD)	200,574
Wells Fargo Bank, Niceville, FL (CD)	502,194
First Florida Bank, Destin, FL (CD)	1,620,159
Suntrust Bank, Panama City, FL (CD)	573,593
Community Bank, Miramar Beach, FL (CD)	511,178
Compass Bank, Niceville, FL (checking)	15,606
Wells Fargo Bank, Niceville, FL (checking)	923
First Florida Bank, Destin, FL (money market)	878,146
Summit Bank, Pensacola, FL (checking)	46,512
Bank of America, Niceville, FL (checking)	3,012
Hancock Bank, Niceville, FL (money market)	451,745
First Florida Bank (checking)	23,110

Subtotal Cash

\$	5,892,176
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Cash Convertible Assets

Cash value of paid up life insurance	\$ 257,714
Subtotal Cash Convertible Assets	\$ 257,714

Secured Loans Receivable

Erin Victoria Gaetz, Denver, CO (secured by common shares, First Florida Bank)	\$ 50,000
Matthew Louis Gaetz II, Fort Walton Beach, FL (secured by common shares, First Florida Bank)	50,000
Subtotal Secured Loans Receivable	\$ 100,000

Real Estate **

Lot 36, Cumberland Harbour, St. Marys, GA (Parcel: 160C036)	\$ 275,000
Lot 12, Osprey Cove, Niceville, FL (Parcel: 14-IS-22-4808-0000-0120)	430,000
Lot 10, Seclusion Dunes, Santa Rosa Beach, FL (Parcel: 19-3S-18-16200-000-0100)	3,700,000
9.2 acres unimproved, Washington Island, WI (Parcel: 0280112332911E)	62,000
Lot 7, Commodore Point, Regatta Bay, Destin FL (Parcel: 00-2S-22-0515-0000-0070)	437,000
Office Building, 9 Cordova Square 4400 Bayou Blvd, Pensacola FL 66% ownership (Reference # 331S307800000009)	200,000
Residence: 24 Bluewater Point, Niceville, FL (Parcel: 16-1S-22-0000-0002-0110)	1,295,000
Residence: Apartment C-217, 250 Mercer St. New York, NY (77% co-op ownership)	665,000
Residence: 30 Roberts Way, Seaside, FL (Parcel: 15-3S-19-25080-00C-0100)	1,400,000
Residence/Homestead: 31 Natchez Street, Seaside, FL (Parcel: 15-3S-19-25140-00D-0020)	2,200,000

Real Estate Continued...

Residence: 80 Tupelo Circle, Seaside, FL (Parcel: 15-3S-19-25080-00C-0070)	1,300,000
Residence: 35 Dalton Drive, Seagrove Beach, FL (Parcel: 24-3S-19-25030-003-0210)	380,000
Residence: 824 West Beach Dr., Panama City, FL (Parcel: 18616-000-000)	1,780,000 ***

Subtotal Real Estate

\$ 14,124,000

*(**values based on Realtor estimates)*

*(*** this property was damaged by Hurricane Michael,*

*The substantially reduced value compared to 2017
reflects post-hurricane conditions which are under
repair at the present time)*

Household Goods, Personal Property, Vehicles

Antiques, imported rugs, furniture, antiquarian books	\$ 375,000
Office furniture and equipment	12,000
2013 Mercedes S550	28,000

Subtotal Personal Property

\$ 415,000
Total Assets

\$ 28,326,269
Statement of Liabilities

Credit card balances	\$ 12,416
Mortgages, loans and notes payable	-

Subtotal Personal Property

\$ 12,416
Total Liabilities

\$ 12,416
Net Worth

\$ 28,313,853

Attachment B:
Primary Sources of Income/Tax Year 2018

First Florida Bank PO Box 128 Destin, FL	\$ 41,100
Suntrust Bank PO Box 622227 Orlando, FL	2,286
Hancock Bank PO Box 4019 Gulfport, MS	14,315
Merrill Lynch Investments 5041 Bayou Blvd Pensacola, FL	25,947
Compass Bank 1130 John Sims Parkway Niceville, FL	4,843
Summit Bank PO Box 15428 Panama City, FL	37
T. Rowe Price 4515 Painters Mill Road Owings Mills, MD	1,087
American Funds PO Box 1148 Norfolk, VA	16,170
National Securities Corp. One Union Square Seattle, WA	740
Cottage Rental Agency 121 Buds Lane Santa Rosa Beach, FL	68,326

Primary Sources of Income Continued...

Treveron, Inc. PO Box 1234 Niceville, FL	46,666
Caregivers, Inc./PayDay, Inc. II Suite 9, 4400 Bayou Blvd Pensacola, FL	36,000
Social Security Administration PO Box 2000 Richmond, CA	38,647
Florida Retirement System PO Box 9000 Tallahassee, FL	58,817
Blackrock Fund/SunTrust Investments PO Box 596 Richmond, VA	53,764
Valparaiso Realty PO Box 88 Valparaiso, FL	3,000
Community Bank 323 E 3 rd Street Forest, MS	3,739
Capital Group PO Box 6164 Indianapolis, IN	16,710
ASI Preferred Insurance Corp. St. Petersburg, FL <i>(Proceeds from hurricane damage insurance claim)</i>	454,433

Total Primary Sources of Income

\$	886,627
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Attachment C:

Financial Statement/Don Gaetz Tax Year 2018

Secondary Sources of Income

Don Gaetz is the beneficial owners of 10 percent or more of the common shares of Caregivers, Inc., a private duty personal care services company.

The Council on Aging of Northwest Florida, 875 Royce Street, Pensacola, Florida, accounts for 10 percent or more of Caregivers, Inc.'s gross income for tax year 2018. The Council on Aging provides community care for the elderly services to facilitate clients being able to remain in their own homes in lieu of institutions. The Council purchases personal care services (assistance with ambulation, toileting, eating, respite, homemaking and sitter services) from Caregivers, Inc.

Don Gaetz is the beneficial owner of 10 percent or more of the common shares of Treveron, Inc. a property investment and management services company.

Caregivers, Inc., Suite 9, 4400 Bayou Boulevard, Pensacola, Florida accounts for 10 percent or more of Treveron's gross income for tax year 2018. Caregivers, Inc. provides private duty personal care of the elderly, disabled and children in Escambia, Santa Rosa and Okaloosa counties. Caregivers rents office space and purchases management, marketing, financial administration and other services from Treveron, Inc.

Scope of Disclosure

The assets, liabilities and income disclosed in this statement are either owned solely by Don Gaetz or owned jointly with his wife, Victoria Q. Gaetz. This disclosure **does not** contain those assets and income solely held in the name of Victoria Q. Gaetz nor does it contain those assets and incomes in the names of or held in trust for the adult children or other family members of Don and Victoria Gaetz. Mr. Gaetz is advised by counsel that assets and income of his wife, adult children and other family members which he may have placed in trust for them are not required to be disclosed in this report.

June 28, 2019


Don Gaetz