FORM 6 FULL AND PUBLIC DISCLOSURE OF FINANCIAL INTERESTS 2018

FOR OFFICE USE ONLY:
FLORIDA
COMMISSION ON ETHICS

JUL 08 2019

RECEIVED

**********AUTO**MIXED AADC 323 T7 P1 61 1086
Kimberly Diane Overman
Board Member [County Comm Ex Officio]
Hillsborough County
Elected Constitutional Officer
Fl 2
601 E Kennedy Blvd
Tampa, FL 33602-4151

PROCESSED

ID Code

ID No. 275069

Conf. Code

Overman, Kimberly Diane

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, 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 30, 20 19 was $ 820,738 KO.

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
Piano, ARTWORK, Household	25,000 KO
Residential Office Property	650,000 KO
Retirement Plans	32909 KO
Businesses	480,000 KO

PART C -- LIABILITIES

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

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY
Bank of Tampa Mortgage	330,000
BANK of America CC	22,854

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY

(Continued on reverse side)

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
BOCC	601 E Kennedy Blvd	$100,000
The Financial Well	4610 N. Central Ave	$85,000

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
The Heights Exchange LLC		4610 N. Central	Rental
	The Financial Well	Tampa, FL Ave	

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

	BUSINESS ENTITY # 1	BUSINESS ENTITY # 2	BUSINESS ENTITY # 3
NAME OF BUSINESS ENTITY	THE Financial Well	The Heights Exchange LLC	
ADDRESS OF BUSINESS ENTITY	4610 N Central Ave	4610 N. Central Ave	
PRINCIPAL BUSINESS ACTIVITY	Financial Planning	Property Management	
POSITION HELD WITH ENTITY	CEO	General Member	
I OWN MORE THAN A 5% INTEREST IN THE BUSINESS	Yes, 100%	100 yes	
NATURE OF MY OWNERSHIP INTEREST	Owner/Operation	Owner	

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.

Kimberly Overman

SIGNATURE OF REPORTING OFFICIAL OR CANDIDATE

STATE OF FLORIDA
COUNTY OF Hillsborough

Sworn to (or affirmed) and subscribed before me this 1st day of July, 20 19 by Kimberly Overman

(Signature of Notary Public--State of Florida)

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

SUSAN WEBB LONG
MY COMMISSION # GG 290719
EXPIRES: May 11, 2023
Bonded Thru Notary Public Underwriters

Personally Known ____ OR Produced Identification ____

Type of Identification Produced ____

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, Kimberly Overman, 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 Kimberly Overman 7/1/19

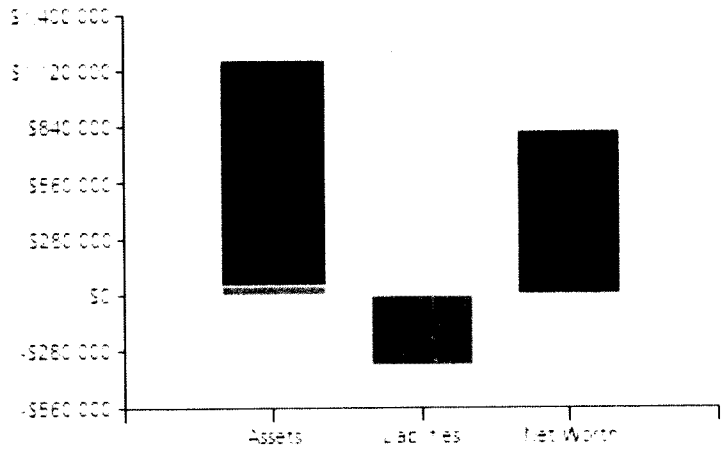
Signature Date

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 ☐

Net Worth Summary

This is your Net Worth Summary as of 07/01/2019. Your Net Worth is the difference between what you own (your Assets) and what you owe (your Liabilities). To get an accurate Net Worth statement, make certain all of your Assets and Liabilities are entered.



Investment Assets		$43,592
Other Assets	+	$1,130,000
Total Assets		$1,173,592
Total Liabilities	-	$352,854
Net Worth		$820,738

Description	Total
Investment Assets	
Employer Retirement Plans	$12,048
Individual Retirement Accounts	$24,194
Taxable and/or Tax-Free Accounts	$7,350
Total Investment Assets:	**$43,592**
Other Assets	
Home and Personal Assets	$680,000
Business and Property	$450,000
Total Other Assets:	**$1,130,000**
Liabilities	
Personal Real Estate Loan:	$330,000
Other Personal Debt:	$22,854
Total Liabilities:	**$352,854**
Net Worth:	**$820,738**

Net Worth Detail

This is your Net Worth Detail as of 07/01/2019. Your Net Worth is the difference between what you own (your Assets) and what you owe (your Liabilities). To get an accurate Net Worth statement, make certain all of your Assets and Liabilities are entered.

Description	Kimberly	Joint	Total
Investment Assets			
Employer Retirement Plans			
457	$12,048		$12,048
Individual Retirement Accounts			
SCHWAB Brokerage Account	$19,775		$19,775
XXXX-7511	$4,419		$4,419
Taxable and/or Tax-Free Accounts			
Checking Account	$7,000		$7,000
XXXX-2021	$350		$350
Total Investment Assets:	**$43,592**	**$0**	**$43,592**
Other Assets			
Home and Personal Assets			
Envoy Vehicle	$5,000		$5,000
Personal Property	$25,000		$25,000
Residential Office Property	$650,000		$650,000
Business and Property			
The Financial Well Inc.	$400,000		$400,000
The Heights Exchange LLC	$50,000		$50,000
Total Other Assets:	**$1,130,000**	**$0**	**$1,130,000**
Liabilities			
Personal Real Estate Loan:			
BOT Mortgage	$330,000		$330,000
Other Personal Debt:			
BOA Credit Card	$22,854		$22,854
Total Liabilities:	**$352,854**	**$0**	**$352,854**

Net Worth Detail

Net Worth:	**$820,738**