

FOR OFFICE USE ONLY:

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HON KATHLEEN PASSIDOMO
STATE SENATOR, 28TH DISTRICT
Senate
Elected Constitutional Officer
2200 SOUTHWINDS DR
NAPLES FL 34102-7656

FLORIDA
COMMISSION ON ETHICS

JUN 15 2021

RECEIVED

ID CODE



ID NO.

40109

CONF. CODE

Passidomo, Kathleen

PROCESSED

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, 2020 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, 2020 was \$ 9,826,478.41.

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 \$ 100,000.00

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

DESCRIPTION OF ASSET (specific description is required - see instructions p.4)	VALUE OF ASSET
See Attached	

PART C -- LIABILITIES

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

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY
See Attached	

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

NAME AND ADDRESS OF CREDITOR	AMOUNT OF LIABILITY
See Attached	

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 2020 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 2020 federal income tax return and all W2's, schedules, and attachments.
 [If you check this box and attach a copy of your 2020 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 Attached		

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 Attached		

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	See Attached		
POSITION HELD WITH ENTITY			
I OWN MORE THAN A 5% INTEREST IN THE BUSINESS			
NATURE OF MY OWNERSHIP INTEREST			

PART F - TRAINING

This section applies only to officers required to complete annual ethics training pursuant to section 112.3142, F.S. [See instructions p. 6]

☒ 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 Collier

Sworn to (or affirmed) and subscribed before me by means of
☒ physical presence or ☐ online notarization, this 10th day of June, 2021 by Bethleen C. Passidomo

[Signature]
 (Signature of Notary Public--State of Florida)

Sudith A. Anderson
 (Print, Type, or Stamp Commissioned Name of Notary Public)

SIGNATURE OF REPORTING OFFICIAL ON CARD DATE

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, _____, 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 ☒

ATTACHMENT

FORM 6 FULL AND PUBLIC DISCLOSURE OF FINANCIAL INTEREST-2020

As of 12/31/20

Hon. Kathleen Passidomo
State Senator, 28th District
Florida Senate
Elected Constitutional Officer
2200 Southwinds Drive
Naples, FL 34102-7656

PART B-ASSETS

Description of Asset	Value of Asset
Residence: 2200 Southwinds Drive, Naples, FL	\$3,400,000.00
Second home: 308 S. Franklin Blvd, Tallahassee, FL	\$ 130,000.00
26.73% interest in Kellpassner, LLC which has single asset: commercial condominium units Units 201, 202, 204, 206, Naples Chamber Center, a condominium 2390 N. Tamiami Trail, Naples, FL	\$ 433,000.00 (value of 26.73% interest)
2.5% interest in ZMZLM, LLC which has a single asset: restaurant known as Hob Knob located at 720 5 th Avenue South, Naples, FL	\$ 10,000.00 (value of 2.5% interest)
Promissory Note from ZMZLM 2, LLC	\$ 31,250.00
3% interest in Barbatella, LLC which has a single asset: restaurant known as Barbatella located at 1290 Third Street South, Naples, FL	\$ 100,000.00 (value of 3% interest)
Stock-Pfizer, Inc.	\$ 19,446.04
Stock-F.N.B. Corp	\$ 27,992.80
Stock-Fifth Third Bankcorp	\$ 35,025.63

Investment Account-Wells Fargo Advisors:		\$3,873,600.92
shares of iShares Core S&P Midcap ETF	\$ 148,683.92	
shares of iShares Core S&P Smallcap	\$ 71,061.03	
shares of iShares MSCI Emerging Markets	\$ 130,729.02	
shares of iShares MSCI EAFE in ETF	\$ 343,933.44	
shares of Invesco TR II S&P Mid Cap 400 ETF	\$ 62,233.69	
shares of SPDR S & P Dividend ETF SPY	\$ 174,618.82	
shares of SPDR Dow Jones INDL Average (DIA)	\$ 1,431,517.04	
shares of SPDR S&P 500 Trust (SPY)	\$ 1,508,895.93	
cash/sweep balance	\$ 1,928.03	
Simple IRA-Wells Fargo Advisors:		\$ 218,230.20
shares of iShares MSCI EAFE Index Fund (EFA)	\$ 58,825.82	
shares of Invesco QQQ Trust Unit Ser 1 (QQQ)	\$ 79,985.18	
shares of SPDR Dow Jones INDL Average ETF (DIA)	\$ 34,354.89	
Shares of Ishares MSCI Emerging Markets EEM	\$ 44,792.20	
cash/sweep balance	\$ 272.11	
IRA-Wells Fargo Advisors:		\$ 993,866.81
shares of iShares Core S&P Midcap ETF	\$ 56,614.02	
shares of iShares Core S&P Smallcap	\$ 55,407.06	
shares of iShares MSCI ETF Emerging Markets	\$ 38,129.35	
shares of iShares MSCI EAFE in ETF EFA	\$ 118,696.50	
shares of Invesco TR II S&P ETF Midcap 400	\$ 54,931.10	
shares of Invesco TR II ETF Smallcap 600	\$ 54,335.86	
shares of Invesco QQQ TR ETF Unit Ser 1	\$ 469,667.20	
shares of SPDR Dow Jones INDL Average (DIA)	\$ 88,467.79	
shares of SPDR S&P 500 Trust (SPY)	\$ 57,269.44	
cash/sweep balance	\$ 348.49	
IRA-Northwestern Mutual (variable annuity 100% balanced funds)		\$ 96,912.90
FRS Investment Plan (self directed-100% FRS Select Moderate Balanced Fund A-20)		\$ 45,142.82
Bank Accounts (Checking and Savings)-Fifth Third Bank, Naples, FL		\$ 440,551.06
Health Savings Account-Simmons Bank, P.O. Box 7009, Pine Bluff, AR		\$ 1,819.20
Partnership interest in law firm of Kelly, Passidomo & Alba, LLP/Kathleen C. Passidomo, P.A.		\$ 86,000.00

PART C LIABILITIES

Liabilities in excess of \$1000

Name and Address of Creditor	Amount of Liability
Northern Trust, N.A. 4001 North Tamiami Trail, Naples, FL 34103 26.73% interest in Units 201, 202, 204, 206, Naples Chamber Center 2390 N. Tamiami Trail, Naples, FL	\$216,358.97

Joint and Several Liabilities Not Reported Above:

Name and Address of Creditor	Amount of Liability
Northern Trust, N.A. 4001 North Tamiami Trail, Naples, FL 34103 73.27% interest in Units 201, 202, 204, 206, Naples Chamber Center 2390 N. Tamiami Trail, Naples, FL	\$593,064.80

PART D—INCOMEPrimary Sources of Income
Exceeding \$1,000

Address of Source of Income

Amount/Annual Income
As of 12/31/19

Kelly, Passidomo & Alba, LLP/ Kathleen C. Passidomo, P.A.	2390 North Tamiami Trail Suite 204 Naples, FL 34103	\$ 38,300.00
State of Florida	The Capital 402 South Monroe street Tallahassee, FL 32399	\$ 28,806.12
Investment Account- Wells Fargo Advisors	5801 Pelican Bay Blvd. Suite 200 Naples, FL 34108	\$ 67,440.59
Distribution-Barbatella, LLC	1290 Third Street South, Naples, FL	\$ 10,000.00
F.N.B. Corp -Dividends	10 Commerce Drive, Cranford, NJ 07016	\$ 1,364.79

Rental income commercial condominium units Units 201, 202, 204, 206, Naples Chamber Center, a condominium	2390 N. Tamiami Trail, Naples, FL	\$ 38,300.00
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Secondary Sources of Income [Major customers, clients, etc. of businesses owned by the reporting person]

Name of Business Entity	Name of Major Sources of Business Income	Address of Source	Principal Business Activity of Source
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Kellpassner, LLC	Tenants: Kelly, Passidomo & Alba, LLP Shaun Kelly, CPA	2390 North Tamiami Trail Suite 204 Naples, FL 34103	Law firm Accountant
ZMZLM, LLC	Hobnob Restaurant	720 Fifth Avenue South, Naples, FL 34102	Restaurant
Barbatella, LLC	Barbatella Restaurant	1290 Third Street South, Naples, FL 34102	Restaurant

PART E-INTERESTS IN SPECIFIED BUSINESSES

	Business Entity #1	Business Entity #2	Business
Entity #3			

Name of Business Entity	N/A	N/A	N/A
Address of Business Entity			
Principal Business Activity			
I own more than a 5% interest in the Business			
Nature of my ownership interest			

Senator Kathleen C. Passidomo
2200 South Winds Drive
Naples, Florida 34102

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COMMISSION ON ETHICS

JUN 15 2021

June 10, 2020

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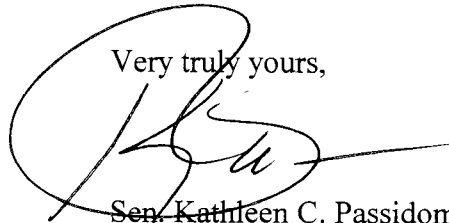
Florida Commission on Ethics
325 John Knox Road
Building E
Suite 200
Tallahassee, FL 32303

Dear Reader:

Enclosed herewith is my Form 6 Full and Public Disclosure of Financial Interests for the year 2020 for filing.

Thank you.

Very truly yours,

A handwritten signature in black ink, appearing to be 'K. Passidomo', written over a large, loopy circular flourish.

Sen. Kathleen C. Passidomo