

**FORM 6****FULL AND PUBLIC DISCLOSURE  
OF FINANCIAL INTERESTS****2021**

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:

24 Bluewater Point

CITY:

Niceville

ZIP:

32578

COUNTY:

Okaloosa

NAME OF AGENCY:

Triumph Gulf Coast (term ends 6/29/22) and FL Commission on Ethics

NAME OF OFFICE OR POSITION HELD OR SOUGHT:

Board Member, Commissioner

CHECK IF THIS IS A FILING BY A CANDIDATE ☐**PROCESSED**FLORIDA  
COMMISSION ON ETHICS

JUN 30 2022

**RECEIVED**

22814

**PART A — NET WORTH**Please enter the value of your net worth as of December 31, 2021 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 29, 20 22 was \$ 33,940,010.**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 ATTACHED                                                                   | \$ 33,947,887  |
|                                                                                |                |
|                                                                                |                |
|                                                                                |                |

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

| NAME AND ADDRESS OF CREDITOR | AMOUNT OF LIABILITY |
|------------------------------|---------------------|
| SEE ATTACHED                 | \$ 7,877            |
|                              |                     |
|                              |                     |
|                              |                     |

**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 2021 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 2021 federal income tax return and all W2's, schedules, and attachments.

[If you check this box and attach a copy of your 2021 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                               |                             | \$ 559,803 |
|                                            |                             |            |

### 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                   |                     |                     |                     |
| 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 Okaloosa

Sworn to (or affirmed) and subscribed before me by means of ☒ physical presence or ☐ online notarization, this 29<sup>th</sup> day of

June, 2022 by Donald Jay Gaetz

(Signature of Notary Public) Ben Richey  
 (Print, Type, or Stamp Commissioned Notary Public - State of Florida  
 Commission # HH 078784  
 My Comm. Expires on 12/31/25  
 Bonded through National Notary Assn.

Personally Known ☒ OR Produced Identification NA

Type of Identification Produced NA

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 Jordan, CPA, 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.

Heather Jordan, CPA  
 Signature

6/29/2022  
 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 29, 2022**

**Part B - Assets**

**Cash and Cash Equivalents:**

|                                                           |                     |
|-----------------------------------------------------------|---------------------|
| Bank of America, checking account, Niceville, FL          | \$ 7,423            |
| Synovus Bank, Niceville, FL (money market)                | \$ 1,507,512        |
| Hancock/Whitney Bank checking account, Niceville, FL      | \$ 18,933           |
| Hancock/Whitney Bank, Money Market account, Niceville, FL | \$ 192,446          |
| Merrill Edge direct deposit, Pensacola, FL                | \$ 72,391           |
| Merrill Lynch bank deposit program, Pensacola FL          | \$ 1,051,735        |
| Merrill Lynch preferred deposit, Pensacola, FL            | \$ 189,815          |
| Merrill Lynch closing cash account, Pensacola, FL         | \$ 7,966            |
| Midland National Insurance (annuity)                      | \$ 647,840          |
| The First Bancorp, checking account, Destin, FL           | \$ 11,344           |
| The First Bancorp, money market account, Destin FL        | \$ 1,291,283        |
| BancorpSouth, Pensacola, FL (checking account)            | \$ 17,445           |
| <b>Subtotal Cash and Cash Equivalents</b>                 | <b>\$ 5,016,133</b> |

**Other Cash convertible assets:**

|                                               |                   |
|-----------------------------------------------|-------------------|
| Cash value of life insurance                  | \$ 278,233        |
| <b>Subtotal Other Cash Convertible Assets</b> | <b>\$ 278,233</b> |

**Securities:**

|                           |              |
|---------------------------|--------------|
| Cigna                     | \$ 12,569    |
| AT and T                  | \$ 6,110     |
| Bank of America           | \$ 52,973    |
| Charter Communication     | \$ 12,166    |
| Coca Cola                 | \$ 126,760   |
| Pfizer                    | \$ 37,128    |
| Viatis                    | \$ 100,055   |
| AB Municipal Income Fund  | \$ 146,088   |
| Invesco QQQ Trust         | \$ 100,011   |
| Abbott Labs               | \$ 3,461     |
| AbbVie Inc                | \$ 7,074     |
| Adobe Systems             | \$ 6,165     |
| Advanced Auto Parts       | \$ 2,468     |
| Air Products              | \$ 5,416     |
| Alcon                     | \$ 3,363     |
| Amazon                    | \$ 16,829    |
| American Tower REIT       | \$ 3,330     |
| Apple                     | \$ 7,889     |
| Aptiv PLC                 | \$ 2,975     |
| ASML Holdings             | \$ 2,881     |
| Atlassian                 | \$ 3,014     |
| Automatic Data Processing | \$ 4,013     |
| Best Buy                  | \$ 2,626     |
| Blackrock Mutual Asset    | \$ 1,263,974 |
| Broadcom                  | \$ 8,123     |
| Chevron                   | \$ 6,113     |
| Chewy                     | \$ 15,770    |
| Cisco Systems             | \$ 4,145     |
| Comcast                   | \$ 2,170     |
| Corning                   | \$ 2,364     |
| Crown Castle REIT         | \$ 5,121     |
| Dexcom                    | \$ 2,384     |
| Disney                    | \$ 3,313     |

**Securities Continued...**

|                                 |    |         |
|---------------------------------|----|---------|
| Eaton Corp                      | \$ | 5,960   |
| Eli Lilly                       | \$ | 230,759 |
| Equinix                         | \$ | 2,748   |
| Eversource Energy               | \$ | 1,569   |
| Fidelity National Info Services | \$ | 3,553   |
| Gilead Sciences                 | \$ | 13,330  |
| Home Depot                      | \$ | 4,844   |
| Intel                           | \$ | 190,019 |
| Illinois Tool Works             | \$ | 2,705   |
| JP Morgan Chase                 | \$ | 3,174   |
| Kimberly Clark                  | \$ | 26,060  |
| Lockheed Martin                 | \$ | 3,961   |
| Marsh and McLennan              | \$ | 4,639   |
| McDonalds                       | \$ | 4,288   |
| Medtronic                       | \$ | 4,607   |
| Merck                           | \$ | 6,902   |
| Microsoft                       | \$ | 18,759  |
| Mondelez Intl                   | \$ | 6,165   |
| Monster Beverage                | \$ | 3,476   |
| NextEra Energy                  | \$ | 6,282   |
| Nvidia                          | \$ | 6,071   |
| Palo Alto Networks              | \$ | 5,028   |
| Paychex                         | \$ | 3,467   |
| PepsiCo                         | \$ | 6,375   |
| Phillips 66                     | \$ | 1,613   |
| PNC Financial Services          | \$ | 5,960   |
| Proctor and Gamble              | \$ | 6,507   |
| Prologis                        | \$ | 3,970   |
| QualComm                        | \$ | 4,270   |
| Raytheon                        | \$ | 3,519   |
| Realty INCM Corp                | \$ | 4,571   |
| SalesForce                      | \$ | 4,326   |
| SEA Ltd                         | \$ | 2,480   |
| Sempra Energy                   | \$ | 4,588   |
| Splunk                          | \$ | 2,256   |
| Starbucks                       | \$ | 4,004   |
| Texas Instruments               | \$ | 5,303   |
| Thermo Fisher Scientific        | \$ | 5,676   |
| Tractor Supply                  | \$ | 2,248   |
| Truist Financial                | \$ | 5,621   |
| Uber Technologies               | \$ | 2,436   |
| Unipath                         | \$ | 1,229   |
| Ultra Beauty                    | \$ | 1,692   |
| United Parcel                   | \$ | 8,930   |
| United Health                   | \$ | 7,452   |
| US Bancorp                      | \$ | 2,547   |
| VISA                            | \$ | 8,911   |
| VMWare                          | \$ | 2,684   |
| WW Grainger                     | \$ | 3,409   |
| WEC Energy Group                | \$ | 2,732   |
| Workday Inc                     | \$ | 2,188   |
| Zoetis                          | \$ | 5,128   |
| The First Bancshares            | \$ | 490,793 |
| Sherwin Williams                | \$ | 2,144   |
| Stryker                         | \$ | 1,876   |
| Unity Software                  | \$ | 719     |
| Paypal Holdings                 | \$ | 2,897   |

**Securities Continued...**

|                                     |           |                  |
|-------------------------------------|-----------|------------------|
| S and P Global                      | \$        | 3,595            |
| Meta Platforms                      | \$        | 7,562            |
| Netflix                             | \$        | 2,369            |
| Nike                                | \$        | 3,803            |
| Intuitive Surgical                  | \$        | 3,187            |
| Keurig Dr. Pepper                   | \$        | 2,814            |
| American Funds Growth and Income-C  | \$        | 133,455          |
| American Funds Balanced Fund A      | \$        | 36,688           |
| American Funds Balanced Fund C      | \$        | 68,831           |
| American Funds Balanced Fund F1     | \$        | 80,066           |
| Growth Fund of America A            | \$        | 35,449           |
| Growth Fund of America C            | \$        | 45,868           |
| Growth Fund of America F1           | \$        | 73,115           |
| American Mutual Fund A              | \$        | 32,891           |
| American Mutual Fund F1             | \$        | 62,710           |
| State of Florida Deferred Comp Plan | \$        | 29,677           |
| <b>Subtotal Securities</b>          | <b>\$</b> | <b>3,780,341</b> |

**Closely-held private companies; not publically traded:**

|                                                |           |                  |
|------------------------------------------------|-----------|------------------|
| Caregivers, Inc                                | \$        | 758,000          |
| Matterin, Inc                                  | \$        | 2,108,000        |
| Treveron, Inc                                  | \$        | 2,825,000        |
| TechFarm LLC                                   | \$        | 50,000           |
| <b>Subtotal Closely-held private companies</b> | <b>\$</b> | <b>5,741,000</b> |

**Real Estate - values based on Realtor estimates:**

|                                                                                    |                                 |           |                   |
|------------------------------------------------------------------------------------|---------------------------------|-----------|-------------------|
| Lot 36, Cumberland Harbour, St. Mary's GA                                          | Parcel 160C036                  | \$        | 300,000           |
| Lot 12 Osprey Cove, Bolton's Landing Niceville FL                                  | Parcel 14-1S-22-4808-0000-0120  | \$        | 507,150           |
| Lot 10 Seclusion Dunes, Santa Rosa Beach, FL                                       | Parcel 19-3S-18-16200-000-0100  | \$        | 4,760,000         |
| 9.2 acres unimproved land, Washington Island, WI                                   | Parcel 0280112332911E           | \$        | 59,000            |
| Lot 7 Commodore Point, Regatta Bay Destin FL                                       | Parcel 00-2S-22-0-515-0000-0070 | \$        | 457,000           |
| Office Building, 9 Cordova Square,<br>4400 Bayou Blvd Pensacola FL - 66% ownership | Parcel 3315307800000009         | \$        | 180,000           |
| Residence 24 Bluewater Point, Niceville, FL                                        | Parcel 16-1S-22-0000-0002-0110  | \$        | 1,610,000         |
| Residence Apt C-217 250 Mercer St New York, NY                                     | 77% Ownership                   | \$        | 720,000           |
| Residence 30 Roberts Way, Seaside FL                                               | Parcel 15-3S-19-25080-00C-0100  | \$        | 2,120,000         |
| Residence 31 Natchez Street, Seaside, FL                                           | Parcel 15-3S-19-25140-00D-0020  | \$        | 2,400,000         |
| Residence 80 Tupelo Circle Seaside, FL                                             | Parcel 15-3S-19-25080-00C-0070  | \$        | 2,160,000         |
| Residence 35 Dalton Street, Seagrove Beach, FL                                     | Parcel 24-3S-19-25030-003-0210  | \$        | 500,000           |
| Residence 824 West Beach Dr, Panama City, FL                                       | Parcel 18616-000-000            | \$        | 3,000,000         |
| <b>Subtotal Real Estate</b>                                                        |                                 | <b>\$</b> | <b>18,773,150</b> |

**Household goods, Personal Property, Vehicles:**

|                                           |           |                |
|-------------------------------------------|-----------|----------------|
| Antiques, imported rugs, furniture, books | \$        | 340,000        |
| Office furniture and equipment            | \$        | 3,230          |
| 2013 Mercedes S550                        | \$        | 15,800         |
| <b>Subtotal Household Goods</b>           | <b>\$</b> | <b>359,030</b> |

**Total Assets****\$ 33,947,887****Part C - Liabilities**

|                          |           |              |
|--------------------------|-----------|--------------|
| Credit card balances     | \$        | 7,877        |
| Mortgages and loans      | \$        | -            |
| <b>Total Liabilities</b> | <b>\$</b> | <b>7,877</b> |

**Net Worth****\$ 33,940,010**

**Attachment B:**  
**Primary Sources of Income / Tax Year 2021**

**Part D - Income**

**Primary Sources of Income**

|                                                                                        |    |         |
|----------------------------------------------------------------------------------------|----|---------|
| US Dept. of Treasury Internal Revenue Service Austin TX                                | \$ | 1,136   |
| The First A Natl Banking Assn PO Box 15549 Hattiesburg, MS                             | \$ | 3,998   |
| Community Bank of Mississippi PO Box 2019 Brandon, MS                                  | \$ | 16,035  |
| Bank of America Highway 20 East Niceville FL                                           | \$ | 16      |
| Truist/SunTrust Bank PO Box 305183 Nashville, TN                                       | \$ | 1,920   |
| Capital Bank and Trust/American Funds (IRA Distribution) P O Box 6164 Indianapolis, IN | \$ | 40,954  |
| Nationwide Retirement Solutions PO Box 182797 Columbus OH                              | \$ | 1,427   |
| Hancock/Whitney Bank PO Box 4019 Gulfport, MS                                          | \$ | 1,204   |
| The First Bancshares/Computershare PO Box 505000 Louisville KY                         | \$ | 9,689   |
| Merrill Lynch Investments 5041 Bayou Blvd Pensacola, FL                                | \$ | 18,810  |
| Synovus Bank 1148 Broadway Columbus GA                                                 | \$ | 3,646   |
| Seaside Cottage Rental Agency PO Box 4896 Seaside, FL                                  | \$ | 114,134 |
| Treveron, Inc PO Box 1234 Niceville, FL                                                | \$ | 68,000  |
| Caregivers, Inc Suite 9 4400 Bayou Blvd Pensacola, FL                                  | \$ | 106,000 |
| Social Security Administration PO Box 2000 Richmond CA                                 | \$ | 40,890  |
| Florida retirement System PO Box 9000 Tallahassee, FL                                  | \$ | 62,895  |
| Blackrock Fund/Truist Investments PO Box 596 Richmond VA                               | \$ | 69,049  |

**Total Primary Sources of Income**

**\$ 559,803**

**Attachment C:**  
**Secondary Sources of Income / Tax Year 2021**

| <b>Secondary Sources of Income</b> | <b>Name of Major Source of Income</b> | <b>Address of Source</b>       | <b>Principal Business Activity of Source</b> |
|------------------------------------|---------------------------------------|--------------------------------|----------------------------------------------|
| Caregivers, Inc                    | Council on Aging of Northwest Florida | 875 Royce Street Pensacola, FL | Personal care services                       |

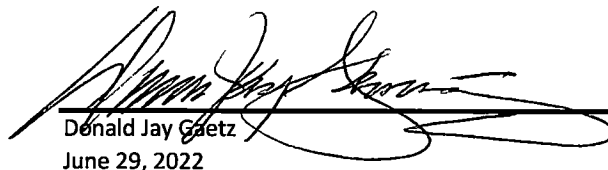
Don Gaetz is the beneficial owner of 10% or more of the common shares of Caregivers, Inc, a private duty personal care services company. The Council on Aging of Northwest Florida, 875 Royce Street, Pensacola, Florida accounts for 10 percent or more of Caregiver, Inc.'s gross income for tax year 2021. The Council on Aging of Northwest Florida provides community care for the elderly services to persons 65 years of age and older to facilitate their being able to remain in their own homes. The Council purchases personal care services (assistance with ambulation, toileting, eating and respite and sitter services) from Caregivers, Inc.

|               |                 |                               |                                                |
|---------------|-----------------|-------------------------------|------------------------------------------------|
| Treveron, Inc | Caregivers, Inc | 4400 Bayou Blvd Pensacola, FL | Real estate investment and management services |
|---------------|-----------------|-------------------------------|------------------------------------------------|

Don Gaetz is the beneficial owner of 10% or more of the common shares of Treveron Inc., a real estate 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 the tax year 2021. Caregivers, Inc. provides private duty personal care of the elderly, disabled and children in Escambia, Okaloosa and Santa Rosa counties of Florida. Caregivers rents office space and purchases management, marketing 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 statement **does not** contain those assets and income solely in the name of Victoria Q. Gaetz, nor does it contain those assets and income in the names of the children or grandchild of Don and Victoria Gaetz. Mr. Gaetz is advised by counsel that assets and income of his wife, children and grandchild and assets he may have placed in trust for them are not required to be disclosed on this report.

  
 Donald Jay Gaetz  
 June 29, 2022