

2024 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/30/2025

General Information

Name: Hon Donald J Gaetz

PID 22814

AGENCY INFORMATION

Organization	Suborganization	Title
Senate	Elected Constitutional Officer	State Senator, District 1

Net Worth

My Net Worth as of May 31, 2025 was \$ 34,784,825.77.

Assets

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 effect is \$ 476,551.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Lot 12 Osprey Cove, Bolton's Landing Niceville FL 32578	\$ 578,000.00
Lot 10 Seclusion Dunes, Santa Rosa Beach, FL 32459	\$ 4,200,000.00
9.2 acres unimproved land, Washington Island, WI 54246 (Property ID # 0280112332911E)	\$ 71,000.00
Lot 7 Commodore Point, Regatta Bay Destin FL 32541	\$ 566,000.00

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Description of Asset	Value of Asset
Residence 24 Bluewater Point, Niceville, FL 32578	\$ 1,709,000.00
Residence Apt C-217 250 Mercer St New York, NY 20012	\$ 877,000.00
Residence 30 Roberts Way, Seaside FL 32459	\$ 2,211,000.00
Residence 31 Natchez Street, Seaside, FL 32459	\$ 3,444,000.00
Residence 35 Dalton Street, Seagrove Beach, FL 32459	\$ 600,000.00
Residence 824 West Beach Dr, Panama City, FL 32401	\$ 2,100,000.00
Residence 2437 Hammock Ln, Crestview, FL 32536	\$ 525,000.00
United Fidelity, Certificates of Deposit, Evansville, IN	\$ 1,678,467.00
Bank of America NA deposit, Pensacola, FL	\$ 7,982.00
Hancock/Whitney Bank checking account, Niceville, FL	\$ 48,542.00
Hancock/Whitney Bank, Certificates of Deposit, Niceville, FL	\$ 267,593.00
Merrill Edge Direct Deposit, Pensacola, FL	\$ 8,874.00
Merrill Edge preferred deposit, Pensacola, FL	\$ 83,404.00
Merrill Lynch bank deposit program, Pensacola FL	\$ 1,704.00
Merrill Lynch preferred deposit, Pensacola, FL	\$ 21,448.00
The First Bancorp, checking account, Destin, FL	\$ 109,221.00
The First Bancorp, checking account, Destin FL	\$ 652,335.00
The First Bancorp, certificates of deposit, Destin FL	\$ 1,223,000.00
Trustmark, certificates of deposit, Destin FL	\$ 1,254,000.00
Cadence Bank, prime interest checking account, Pensacola FL	\$ 716,939.00
Cadence Bank, checking account, Pensacola FL	\$ 3,645.00
Goldman Sachs Bk, Certificates of Deposit, New York NY	\$ 265,100.70
State Bk India, Certificates of Deposit, New York NY	\$ 199,906.00
Mizuho Bank USA, Certificates of Deposit, New York NY	\$ 199,830.00
Morgan Stanley Bk NA, Certificates of Deposit, Salt Lake City UT	\$ 199,652.00
Cash value of life insurance	\$ 273,239.00
Blackrock Multi Asset Income Port A	\$ 1,376,325.30

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Description of Asset	Value of Asset
Stock - AT and T	\$ 7,978.60
Stock - Bank of America	\$ 62,841.12
Stock - Charter Communication	\$ 9,510.48
Stock - Cigna Group	\$ 14,882.08
Stock - Coca Cola	\$ 144,200.00
Stock - Eli Lilly & Co	\$ 442,602.00
Stock - Intel Corp	\$ 5,865.00
Stock - Pfizer	\$ 16,443.00
Mutual fund - AB Municipal Income Fund	\$ 69,744.62
Mutual fund - Invesco QQQ Trust	\$ 168,710.75
Mutual Fund Federate Hermes Instl	\$ 5,019.39
Stock - AbbVie Inc	\$ 10,049.94
Stock - Accenture PLC	\$ 6,019.58
Stock - Air Products	\$ 4,183.65
Stock - AriBNB	\$ 3,225.00
Stock - Airbus	\$ 1,647.72
Stock - Alphabet Inc	\$ 5,667.42
Stock - Amazon	\$ 20,090.98
Stock - Apple	\$ 11,649.30
Stock - ASML Holdings	\$ 4,420.62
Stock - Automatic Data Processing	\$ 6,185.07
Stock - Broadcom	\$ 16,944.90
Stock - Chevron	\$ 5,194.60
Stock - Cisco Systems	\$ 1,449.92
Stock - CME Group Inc	\$ 4,335.00
Stock - Corning	\$ 3,620.07
Stock - Dell Technologies Inc	\$ 1,446.51
Stock - Eaton Corp	\$ 9,606.00
Stock - Eli Lilly & Co	\$ 14,753.40

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Description of Asset	Value of Asset
Stock - Equinix	\$ 3,555.28
Stock - Exxon Mobil Corp	\$ 4,296.60
Stock - Fastenal Company	\$ 1,653.60
Stock - General Dynamics Corp	\$ 1,949.43
Stock - Hartford Insurance Group	\$ 3,375.84
Stock - Home Depot	\$ 6,260.93
Stock - HP Inc	\$ 1,518.90
Stock - Illinois Tool Works	\$ 2,940.96
Stock - Intuit	\$ 5,274.29
Stock - Intuitive Surgical Inc	\$ 5,523.40
Stock - Johnson & Johnson	\$ 8,381.34
Stock - JP Morgan Chase & Co	\$ 7,392.00
Stock - Keurig Dr Pepper Inc	\$ 3,164.98
Stock - Kinder Morgan Inc	\$ 2,495.56
Stock - Lockheed Martin	\$ 3,859.04
Stock - Marsh and McLennan	\$ 11,449.34
Stock - McDonalds	\$ 7,218.55
Stock - Merck	\$ 5,839.84
Stock - Meta Platforms	\$ 15,539.76
Stock - Microsoft	\$ 25,319.80
Stock - Mondelez Intl	\$ 8,233.78
Stock - Monster Beverage	\$ 3,389.35
Stock - Netflix Com Inc	\$ 10,865.07
Stock - NextEra Energy	\$ 6,498.88
Stock - Novo Nordisk	\$ 1,930.50
Stock - Nvidia	\$ 23,782.88
Stock - Oneok Inc (Oklahoma)	\$ 2,182.68
Stock - Palo Alto Networks	\$ 4,618.08
Stock - Paychex	\$ 4,737.30

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Description of Asset	Value of Asset
Stock - Paypal Holdings	\$ 3,865.40
Stock - PepsiCo	\$ 3,286.25
Stock - Phillips 66	\$ 1,021.32
Stock - PNC Financial Services	\$ 4,345.25
Stock - PPL Corporation	\$ 3,787.75
Stock - Proctor and Gamble	\$ 9,174.06
Stock - Prologis	\$ 1,086.00
Stock - Qualcomm	\$ 1,306.80
Stock - Realty INCM Corp	\$ 2,434.66
Stock - RTX Corp	\$ 5,459.20
Stock -S&P Global Inc	\$ 4,615.74
Stock - Salesforce	\$ 6,103.51
Stock - Sempra	\$ 3,850.91
Stock - Sherwin Williams	\$ 3,946.91
Stock - Starbucks	\$ 2,350.60
Stock - Stryker Corp	\$ 3,826.40
Stock - Synopsys Inc	\$ 3,247.86
Stock - Taiwan S Manufacturing	\$ 2,319.84
Stock - TE Connectivity PLC	\$ 2,561.12
Stock - Tesla Inc	\$ 4,503.98
Stock - Texas Instruments	\$ 4,571.25
Stock - Thermo Fisher Scientific	\$ 2,416.92
Stock - Travelers Cos Inc	\$ 8,271.00
Stock - Uber Technologies	\$ 3,282.24
Stock - Union Pacific	\$ 5,098.18
Stock - United Health	\$ 5,736.29
Stock - VIVI PPTYS Inc	\$ 2,917.32
Stock - VISA	\$ 13,146.84
Stock - WW Grainger	\$ 5,437.80

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Description of Asset	Value of Asset
Stock - WEC Energy Group	\$ 2,793.44
Stock - Williams Companies	\$ 9,802.62
Stock -Workday Inc	\$ 4,211.07
Stock - Zoetis	\$ 3,372.60
Stock - Chewy	\$ 8,696.00
Stock - Coke	\$ 69,325.00
Stock - Eli Lilly & Co	\$ 139,153.88
Stock - Gilead	\$ 21,410.00
Stock -Kimberly Clark	\$ 25,287.00
Stock - Sales Force	\$ 5,392.10
Stock - Uber Technologies	\$ 15,868.65
Stock - The First Bancshares	\$ 605,055.10
Mutual fund - American Funds Balanced Fund A	\$ 20,316.79
Mutual fund - American Funds Balanced Fund C	\$ 51,133.17
Mutual fund - American Funds Balanced Fund F1	\$ 72,867.12
Mutual fund - Growth Fund of America A	\$ 107,899.42
Mutual fund - Growth Fund of America C	\$ 40,210.41
Mutual fund - Growth Fund of America F1	\$ 132,252.15
Mutual fund - Growth and Income Portfolio-C	\$ 189,833.63
American Mutual Fund A	\$ 77,130.35
American Mutual Fund C	\$ 29,972.89
American Mutual Fund F1	\$ 86,770.08
Cash Reserves - Ameriprise Financial	\$ 2,085.71
State of Florida Deferred Comp Plan	\$ 23,335.00
Ownership interest in Matterin, Inc	\$ 2,400,000.00
Ownership interest in Treveron, Inc	\$ 2,966,000.00
Ownership interest in TechFarm LLC	\$ 50,000.00

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
N/A		

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

Name of Creditor	Address of Creditor	Amount of Liability
N/A		

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 2024 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 2024 federal income tax return and all W2s, schedules, and attachments.

PRIMARY SOURCES OF INCOME:

Name of Source of Income Exceeding \$1,000	Address of Source of Income	Amount
State of Florida Wages	200 E Gaines St Tallahassee FL	\$ 4,536.95
Cadence Bank	PO Box 789 Tupelo, MS	\$ 30,924.52
Hancock Whitney Bank	PO Box 4019 Gulfport, MS	\$ 39,804.32
Synovus Bank	1148 Broadway Columbus, GA	\$ 42,015.98
The First A National Banking Assn	PO Box 15549 Hattiesburg, MS	\$ 41,986.46
Trustmark National Bank	PO Box 291 Jackson, MS	\$ 30,352.55
Merrill Lynch Investments	5041 Bayou Blvd Pensacola, FL	\$ 75,843.28
Truist Investment Services Inc	PO Box 596 Richmond, VA	\$ 80,030.33
The First Bancshares/Computershare	PO Box 505000 Louisville, KY	\$ 16,705.00
Ameriprise Trust Company	10 Ameriprise Financial Center Minneapolis MN	\$ 27,910.00
Merrill Lynch	PO Box 2150 Lakewood, NJ	\$ 17,055.70
Nationwide Retirement Solutions	PO Box 182797 Columbus, OH	\$ 1,396.22
Florida Retirement System	PO Box 9000 Tallahassee, FL	\$ 67,257.30
Social Security Administration	PO Box 2000 Richmond, CA	\$ 48,564.70
Matterin Inc	PO Box 1234 Niceville, FL	\$ 123,976.00
Treveron Inc	PO Box 1234 Niceville, FL	\$ 89,480.19

SECONDARY SOURCES OF INCOME (Major customers, clients, etc. of businesses owned by reporting person):

Name of Business Entity	Name of Major Sources of Business' Income	Address of Source	Principal Business Activity of Source
N/A			

Interests in Specified Businesses**Business Entity # 1**

N/A

Training

This section applies only to a Constitutional or elected municipal officer, each of whom are required to complete annual ethics training pursuant to Section 112.3142, F.S.

☐ I certify that I have completed the required training under Section 112.3142, F.S.

☒ Required training under Section 112.3142, F.S., not applicable to filer for this form year.

CPA/Attorney Signature Only

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 B 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.

Heather B Jourdan

Digitally signed: 06/30/2025

Signature of Reporting Official or Candidate

Under the penalties of perjury, I declare that I have read the foregoing Form 6 and that the facts stated in it are true.

Donald J Gaetz

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