2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 03/15/2024

General Information

Name: Hon Tara Pascotto Paluck

CONFIDENTIAL

PID 210425

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (20Th)	Elected Constitutional Officer	County Judge

CANDIDATE FOR

Position	Agency Name	Position sought or held
County Judge	Lee County in the 20th Judicial Circuit	Group 8

Net Worth

My Net Worth as of February 28, 2024 was $ 2,544,367.44.

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 $ 100,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER $1,000:

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Description of Asset	Value of Asset
Single Family Residence {REDACTED}	$ 992,461.00
IRA- Traditional-Cash Equivalents- Finemark Money Market- FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 29,389.41
IRA- Traditional- Bond- The Osterweis Strategic Income Fund- FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 3,654.61
IRA- Traditional- Mutual Fund- Nationwide Geneva Small Cap Growth- FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 4,174.19
IRA- Traditional- Mutual Fund- Virtus Kar Small Cap Fund- FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 3,978.43
IRA- Traditional- Mutual Fund- Prospector Opportunity Fund- FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 6,736.13
IRA- Traditional- Mutual Fund- Spyglass Growth Fund Inst. 4212- FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 5,720.88
IRA- Traditional- Mutual Fund- Artisan Focus Fund Advisor Shares- FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 21,126.27
IRA- Traditional- Mutual Fund- Edgewood Growth Fund - Ins. 2131- FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 17,896.39
IRA- Traditional- Mutual Fund- Goldman Sachs GOG Partners- FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 10,723.36
IRA- Traditional- Mutual Fund- GQG Partners Emerging Markets Equity- FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 5,557.12
IRA- Traditional- Mutual Fund- JOHCM International Select Fund- FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 7,860.93
IRA- Traditional- Mutual Fund- ABBY Capital Futures Strategy - FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 9,976.47

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Description of Asset	Value of Asset
IRA- Traditional- Mutual Fund- Catalyst/Millburn Hedge Strategy - FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 4,001.09
IRA- Roth-Finemark Money Market- FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 11,201.48
IRA- Roth-Bond-The Osterweis Strategic Income Fund-FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 2,115.82
IRA- Roth- Mutual Fund- Nationwide Geneva Small Cap Growth- FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 4,990.81
IRA- Roth- Mutual Fund-Spyglass Growth Fund Inst. 4212-FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 3,432.50
IRA- Roth- Mutual Fund- Artisan Focus Fund Advisor Shares- FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 12,394.08
IRA-Roth- Mutual Fund- Edgewood Growth Fund - Ins. 2131- FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 10,499.20
IRA- Roth- Mutual Fund- Goldman Sachs GOG Partners-FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 6,134.18
IRA- Roth- Mutual Fund- GQG Partners Emerging Markets Equity- FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 3,293.12
IRA- Roth- Mutual Fund- JOHCM International Select Fund-FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 4,497.68
IRA- Roth- Mutual Fund- ABBY Capital Futures StrategyFineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 6,488.27
IRA- Roth- Mutual Fund- Catalyst/Millburn Hedge Strategy FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 2,316.44
IRA - Prudential - AST Core Fixed Income Portfolio - Osaic Financial Group - 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 3,993.48

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Description of Asset	Value of Asset
IRA - Prudential - AST Global Bond Portfolio - Osaic Financial Group - 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 8,014.50
IRA - Prudential - AST International Equity Portfolio - Osaic Financial Group - 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 12,503.51
IRA - Prudential - Large Cap Growth Portfolio - Osaic Financial Group - 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 22,607.58
IRA - Prudential - Large Cap Value Portfolio- Osaic Financial Group - 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 20,721.00
IRA - Prudential - AST Midcap Growth Portfolio - Infinex Financial Group - 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 4,317.41
IRA - Prudential - AST Midcap Value Portfolio - Osaic Financial Group - 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 4,167.01
IRA - Prudential - AST Small Cap Growth Portfolio - Osaic Financial Group - 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 4,388.04
IRA - Prudential - AST Small Cap Value Portfolio - Osaic Financial Group - 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 3,999.92
IRA -AXA Equitable- GB EQ/Balanced Strategy - Osaic Financial Group - 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 1,529.81
IRA -AXA Equitable- GB EQ/Growth Strategy - Osaic Financial Group - 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 1,848.69
IRA -AXA Equitable- GB EQ/Moderate Growth Strategy - Osaic Financial Group - 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 3,372.26
Preferred Money Market- FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 232,520.43
Checking Account- Northern Trust Bank, 7960 Summerlin Road, Fort Myers, FL 33907	$ 194,781.47

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Description of Asset	Value of Asset
Money Market Account- Northern Trust Bank, 7960 Summerlin Road, Fort Myers, FL 33907	$ 227,157.08
Money Market (POD Ron Paluck)- Northern Trust Bank, 7960 Summerlin Road, Fort Myers, FL 33907	$ 234,751.46
State of Florida Deferred Compensation - Nationwide- American Funds Emerging Markets Bond Fund- Class R-6- PO Box 182797, Columbus, OH 43218-2797	$ 8,162.28
State of Florida Deferred Compensation - Nationwide- Dodge & Cox Income Fund Class I- PO Box 182797, Columbus, OH 43218-2797	$ 29,686.84
State of Florida Deferred Compensation - Nationwide- Fidelity Contra Fund K6- PO Box 182797, Columbus, OH 43218-2797	$ 12,393.74
State of Florida Deferred Compensation - Nationwide- Fixed Assets- Short Term INvestments- PO Box 182797, Columbus, OH 43218-2797	$ 16,405.23
State of Florida Deferred Compensation - Nationwide-JP Morgan Mid Cap Value Fund - Class R-6- PO Box 182797, Columbus, OH 43218-2797	$ 8,544.12
State of Florida Deferred Compensation - Nationwide- New Worly Finds (SM)- Class R-6- PO Box 182797, Columbus, OH 43218-2797	$ 14,196.67
State of Florida Deferred Compensation - Nationwide- NRS Florida Fixed Fund- PO Box 182797, Columbus, OH 43218-2797	$ 3,872.82
State of Florida Deferred Compensation - Nationwide- Small-Cap Value Equity Trust D- PO Box 182797, Columbus, OH 43218-2797	$ 5,484.98
State of Florida Deferred Compensation - Nationwide- T. Rowe Price Equity Income Trust B- PO Box 182797, Columbus, OH 43218-2797	$ 31,233.24
State of Florida Deferred Compensation - Nationwide- T. Rowe Price Growth Stock Trust B- PO Box 182797, Columbus, OH 43218-2797	$ 20,864.09
State of Florida Deferred Compensation - Nationwide-T. Rowe Price Dividend Growth Fund - I Class-- PO Box 182797, Columbus, OH 43218-2797	$ 23,071.81

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Description of Asset	Value of Asset
State of Florida Deferred Compensation - Nationwide-T. Rowe Price - Overseas=- Stock Fund- I Class- PO Box 182797, Columbus, OH 43218-2797	$ 36,525.80
State of Florida Deferred Compensation - Nationwide-T. Rowe Price - Spectrum Income Fund- I Class- PO Box 182797, Columbus, OH 43218-2797	$ 10,907.92
State of Florida Deferred Compensation - Nationwide - T. Rowe Price US Mid Cap Growth Equity Trust D - PO Box 182797, Columbus, OH 43218-2797	$ 8,699.16
State of Florida Deferred Compensation - Nationwide-Vanguard Real Estate Index Funds - Institutional Shares- PO Box 182797, Columbus, OH 43218-2797	$ 10,612.87
State of Florida Deferred Compensation - Nationwide-Vanguard Total International Stock Index Fund - Institutional Shares- PO Box 12797, Columbus, OH 43218-2797	$ 22,515.12
State of Florida Deferred Compensation - Nationwide-Vanguard (R) Institutional Index Fund - Institutional Plus Shares- PO Box 12797, Columbus, OH 43218-2797	$ 17,487.04
State of Florida Deferred Compensation - Nationwide-Wasatch Small Cap Growth Fund - Institutional Class- PO Box 12797, Columbus, OH 43218-2797	$ 5,760.78
Motor Vehicle- Mazda CX-9 - 2018	$ 25,022.00
Motor Vehicle - GMC Terrain Denali	$ 7,069.00
Boat- Pathfinder 2600 TRS 2018	$ 108,981.00
Checking Account- VMP- Northern Trust Bank , 7960 Summerlin Road, Fort Myers, FL 33907	$ 2,331.57
Personal Certificate of Deposit - FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 405,021.60
IRA- Roth-Prospector Opportunity Fund- FineMark National Bank and Trust, 8695 College Parkway, Ste. 100. Fort Myers, FL 33919	$ 4,041.69

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Liabilities

LIABILITIES IN EXCESS OF $1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Mortgage- R.D. Pascotto Rev. Trust (Nov. 5, 1999)	c/o Northern Trust Bank, 7960 Summerlin Lakes Dr., Fort Myers, FL 33907	$ 270,387.92

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 2023 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 2023 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, salary - Florida Department of Finanacial Services	200 E. Gaines St., Tallahassee, FL 32399	$ 180,616.00
Northern Trust Bank - interest income	7960 Summerlin Blvd., Fort Myers, FL 33907	$ 2,373.03

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			

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Interests in Specified Businesses

Business Entity # 1
N/A

Training

Based on the office or position you hold, the certification of training required under Section 112.3142, F.S., is not applicable to you for this form year.

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.

Tara Pascotto Paluck

Digitally signed: **03/15/2024**

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