2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 05/23/2024

General Information

Name: Hon JB Whitten

PID 261137

AGENCY INFORMATION

Organization	Suborganization	Title
Crestview	Mayor And City Council	Mayor

CANDIDATE FOR

Position	Agency Name	Position sought or held
Mayor for a City, Town or Village - Form 6	City of Crestview	Mayor of Crestview

Net Worth

My Net Worth as of December 31, 2023 was $ 350,000.00.

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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 $ 50,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER $1,000:

Description of Asset	Value of Asset
Residential Home	$ 350,000.00
Reserve Cash	$ 1,500.00
Bank Account # 1	$ 54,000.00
Bank Account # 2	$ 129,000.00

Liabilities

LIABILITIES IN EXCESS OF $1,000:

Name of Creditor	Address of Creditor	Amount of Liability
GM Financial	Burnette Plaza, Fort Worth, TX 76102	$ 22,727.00
The GM Card	PO Box 70321, Philadelphia, PA 19176-.321	$ 16,163.00

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

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

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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
See Attached		

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
See Attached			

Interests in Specified Businesses

Business Entity # 1
N/A

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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.

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.

JB Whitten

Digitally signed: **05/23/2024**

Filed with COE: 05/23/2024

COVER PAGE

Filing Checklist for 2023 Tax Return Filed On Standard Forms

Prepared on: 05/23/2024 07:57:31 am

Return: C:\Users\jbwhi\OneDrive\Documents\HRBlock\Bruce Whitten 2023 Tax Return.T23

To file your 2023 tax return, simply follow these instructions:

Step 1. Sign and date the return

Because you're filing a joint return, Bruce and Theresa both need to sign the tax return.

If your return is signed by a representative for you, you must have a power of attorney attached that specifically authorizes the representative to sign your return. To do this, you can use Form 2848, Power of Attorney and Declaration of Representative.

Step 2. Assemble the return

These forms should be assembled behind Form 1040: U.S. Individual Income Tax Return

- Schedule B
- Form 1040-V

Staple these documents to the front of the first page of the return:

Form W-2: Wage and Tax Statement

1st (City of Crestview)

Form 1099-R: Distributions from Pensions, etc.

1st (Defense Finance & Accounting Service)

Step 3. Pay the balance due on your taxes

Make your check or money order for $7,670 payable to "United States Treasury." Don't send cash.

Write the following on your check or money order:

- "2023 Form 1040" or "2023 Form 1040-SR"
- Bruce's name and address
- Bruce's daytime phone number
- Bruce's Social Security Number

On the right side of the check or money order write the dollar amount of the payment, like this: $7,670

Don't staple or otherwise attach the payment to the return. Instead, just place it loose in the envelope with the return.

Step 4. Mail the return

Mail the return to this address:

Internal Revenue Service
P.O. Box 1214
Charlotte, NC 28201-1214

We recommend that you use one of these IRS-approved methods to send your return. Retain the proof of mailing to avoid a late filing penalty:

- U.S. Postal Service certified mail.
- DHL Express, Express 9:00, Express 10:30, Express 12:00, Express Worldwide, Express Envelope, Import Express 10:30, Import Express 12:00, and Import Express Worldwide.
- FedEx First Overnight, Priority Overnight, Standard Overnight, 2 Day, International Next Flight Out, International Priority, International First, or International Economy.
- UPS Next Day Air Early A.M., Next Day Air, Next Day Air Saver, 2nd Day Air, 2nd Day Air A.M., Worldwide Express Plus, or Worldwide Express.

Step 5. Keep a copy

Print a second copy of the return for your records. We recommend that you also print and retain these supporting forms, which don't need to be sent to the IRS:

- - Background Worksheet
- - Last Year's Data Worksheet
- - Form 1099-INT/OID
- - Charitable Worksheet

- - Social Security Worksheet

2023 return information - Keep this for your records

Here is some additional information about your 2023 return. Keep this information with your records.

You will need your 2023 AGI to electronically sign your return next year.

Quick Summary

Income		$121,346
Adjustments	-	$0
Adjusted gross income		**$121,346**
Deductions	-	$30,700
Taxable income		**$90,646**
Tax withheld or paid already		$3,207
Actual tax due	-	$10,877
Refund applied to next year	-	$0
You Owe		**$7,670**

Form **1040-SR** Department of the Treasury—Internal Revenue Service **U.S. Tax Return for Seniors** | **2023** | OMB No. 1545-0074 | IRS Use Only—Do not write or staple in this space.

For the year Jan. 1–Dec. 31, 2023, or other tax year beginning _____ ,2023, ending _____ ,20____ See separate instructions.

Your first name and middle initial	Last name	Your social security number
Bruce J	Whitten	[redacted]
If joint return, spouse's first name and middle initial	Last name	
Theresa A	Whitten	

Home address (number and street). If you have a P.O. box, see instructions. Apt. no.
102 Crab Apple Avenue

City, town, or post office. If you have a foreign address, also complete spaces below. State ZIP code
Crestview FL 32536

Foreign country name | Foreign province/state/county | Foreign postal code

Presidential Election Campaign Check here if you, or your spouse if filing jointly, want $3 to go to this fund. Checking a box below will not change your tax or refund. ☐ You ☐ Spouse

Filing Status Check only one box.
☐ Single ☒ Married filing jointly (even if only one had income) ☐ Married filing separately (MFS)
☐ Head of household (HOH) ☐ Qualifying surviving spouse (QSS)
If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent:

Digital Assets At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) . . . ☐ Yes ☒ No

Standard Deduction **Someone can claim:** ☐ You as a dependent ☐ Your spouse as a dependent
☐ Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness **You:** ☒ Were born before January 2, 1959 ☐ Are blind
Spouse: ☒ Was born before January 2, 1959 ☐ Is blind

Dependents (see instructions): **(1)** First name Last name | **(2)** Social security number | **(3)** Relationship to you | **(4)** Check the box if qualifies for (see inst.): Child tax credit | Credit for other dependents

If more than four dependents, see instructions and check here ☐

			☐	☐
			☐	☐
			☐	☐
			☐	☐

Income Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld. If you did not get a Form W-2, see instructions.

1a	Total amount from Form(s) W-2, box 1 (see instructions)				1a	19,803
b	Household employee wages not reported on Form(s) W-2				1b	
c	Tip income not reported on line 1a (see instructions)				1c	
d	Medicaid waiver payments not reported on Form(s) W-2 (see instructions)				1d	
e	Taxable dependent care benefits from Form 2441, line 26				1e	
f	Employer-provided adoption benefits from Form 8839, line 29				1f	
g	Wages from Form 8919, line 6				1g	
h	Other earned income (see instructions)				1h	0
i	Nontaxable combat pay election (see instructions)	1i				
z	Add lines 1a through 1h				1z	19,803
2a	Tax-exempt interest	2a	0	b Taxable interest	2b	2,410
3a	Qualified dividends	3a	0	b Ordinary dividends	3b	0
4a	IRA distributions	4a		b Taxable amount	4b	0
5a	Pensions and annuities	5a		b Taxable amount	5b	65,934
6a	Social security benefits	6a	39,058	b Taxable amount	6b	33,199
c	If you elect to use the lump-sum election method, check here (see instructions) ☐					

Attach Schedule B if required.

	7	Capital gain or (loss). Attach Schedule D if required. If not required, check here ☐	7	0
	8	Additional income from Schedule 1, line 10	8	0
	9	Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your **total income**	9	121,346
	10	Adjustments to income from Schedule 1, line 26	10	0
	11	Subtract line 10 from line 9. This is your **adjusted gross income**	11	121,346
Standard Deduction See *Standard Deduction Chart* on the last page of this form.	12	**Standard deduction or itemized deductions** (from Schedule A)	12	30,700
	13	Qualified business income deduction from Form 8995 or Form 8995-A	13	0
	14	Add lines 12 and 13	14	30,700
	15	Subtract line 14 from line 11. If zero or less, enter -0-. This is your **taxable income**	15	90,646
Tax and Credits	16	**Tax** (see instructions). Check if any from: 1 ☐ Form(s) 8814 2 ☐ Form 4972 3 ☐ _____	16	10,553
	17	Amount from Schedule 2, line 3	17	0
	18	Add lines 16 and 17	18	10,553
	19	Child tax credit or credit for other dependents from Schedule 8812	19	
	20	Amount from Schedule 3, line 8	20	0
	21	Add lines 19 and 20	21	0
	22	Subtract line 21 from line 18. If zero or less, enter -0-	22	10,553
	23	Other taxes, including self-employment tax, from Schedule 2, line 21	23	0
	24	Add lines 22 and 23. This is your **total tax**	24	10,553
Payments	25	Federal income tax withheld from:		
	a	Form(s) W-2 — 25a: 500		
	b	Form(s) 1099 — 25b: 2,707		
	c	Other forms (see instructions) — 25c: 0		
	d	Add lines 25a through 25c	25d	3,207
	26	2023 estimated tax payments and amount applied from 2022 return	26	0
If you have a qualifying child, attach Sch. EIC.	27	Earned income credit (EIC) — 27:		
	28	Additional child tax credit from Schedule 8812 — 28:		
	29	American opportunity credit from Form 8863, line 8 — 29:		
	30	Reserved for future use — 30:		
	31	Amount from Schedule 3, line 15 — 31: 0		
	32	Add lines 27, 28, 29, and 31. These are your **total other payments and refundable credits**	32	0
	33	Add lines 25d, 26, and 32. These are your **total payments**	33	3,207

Refund

34 If line 33 is more than line 24, subtract line 24 from line 33. This is the amount you **overpaid** 34

35a Amount of line 34 you want **refunded to you**. If Form 8888 is attached, check here . . . . . ☐ 35a

Direct deposit? See instructions.

b Routing number XXXXXXXXX c Type: ☐ Checking ☐ Savings

d Account number XXXXXXXXXXXXXXXXX

36 Amount of line 34 you want **applied to your 2024 estimated tax** 36

Amount You Owe

37 Subtract line 33 from line 24. This is the **amount you owe.** For details on how to pay, go to *www.irs.gov/Payments* or see instructions 37 7,670

38 Estimated tax penalty (see instructions) 38 324

Third Party Designee

Do you want to allow another person to discuss this return with the IRS? See instructions . . . . . ☐ **Yes.** Complete below. ☒ **No**

Designee's name | Phone no. | Personal identification number (PIN)

Sign Here

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Joint return? See instructions. Keep a copy for your records.

Your signature	Date	Your occupation	If the IRS sent you an Identity Protection PIN, enter it here (see inst.)
		Elected Official	
Spouse's signature. If a joint return, **both** must sign.	Date	Spouse's occupation	If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)
		Retired	
Phone no. 850-634-3522	Email address jbwhitten1@cox.net		

Paid Preparer Use Only

Preparer's name	Preparer's signature	Date	PTIN	Check if: ☐ Self-employed
Firm's name				Phone no.
Firm's address				Firm's EIN

SCHEDULE B (Form 1040)

Department of the Treasury
Internal Revenue Service

Interest and Ordinary Dividends

Attach to Form 1040 or 1040-SR.

Go to *www.irs.gov/ScheduleB* for instructions and the latest information.

OMB No. 1545-0074

2023

Attachment Sequence No. **08**

Name(s) shown on return: Bruce J Whitten

Your social security number: [redacted]

Part I Interest

(See instructions and the Instructions for Form 1040, line 2b.)

Note: If you received a Form 1099-INT, Form 1099-OID, or substitute statement from a brokerage firm, list the firm's name as the payer and enter the total interest shown on that form.

			Amount
1	List name of payer. If any interest is from a seller-financed mortgage and the buyer used the property as a personal residence, see the instructions and list this interest first. Also, show that buyer's social security number and address: Eglin Federal Credit Union		234
	All In Federal Credit Union		2,176
		1	
2	Add the amounts on line 1	2	2,410
3	Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815	3	
4	Subtract line 3 from line 2. Enter the result here and on Form 1040 or 1040-SR, line 2b	4	2,410

Note: If line 4 is over $1,500, you must complete Part III.

Part II Ordinary Dividends

(See instructions and the Instructions for Form 1040, line 3b.)

Note: If you received a Form 1099-DIV or substitute statement from a brokerage firm, list the firm's name as the payer and enter the ordinary dividends shown on that form.

			Amount
5	List name of payer:	5	
6	Add the amounts on line 5. Enter the total here and on Form 1040 or 1040-SR, line 3b	6	0

Note: If line 6 is over $1,500, you must complete Part III.

Part III Foreign Accounts and Trusts

You must complete this part if you **(a)** had over $1,500 of taxable interest or ordinary dividends; **(b)** had a foreign account; or **(c)** received a distribution from, or were a grantor of, or a transferor to, a foreign trust.

Caution: If required, failure to file FinCEN Form 114 may result in substantial penalties. Additionally, you may be required to file Form 8938, Statement of Specified Foreign Financial Assets. See instructions.

		Yes	No
7a	At any time during 2023, did you have a financial interest in or signature authority over a financial account (such as a bank account, securities account, or brokerage account) located in a foreign country? See instructions.		X
	If "Yes," are you required to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR), to report that financial interest or signature authority? See FinCEN Form 114 and its instructions for filing requirements and exceptions to those requirements		X
b	If you are required to file FinCEN Form 114, list the name(s) of the foreign country(-ies) where the financial account(s) is (are) located:		
8	During 2023, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If "Yes," you may have to file Form 3520. See instructions		X

2023 Form 1040- V

Department of the Treasury
Internal Revenue Service

▼ **Detach Here and Mail With Your Payment and Return** ▼

Form **1040-V**
Department of the Treasury
Internal Revenue Service (99)

Payment Voucher

► **Do not staple or attach this voucher to your payment or return.**

OMB No. 1545-0074

2023

Use this voucher when making a payment with Form 1040 or 1040SR. Write your social security number (SSN) on your check or money order.

Amount you are paying by check or money order.
Make your check or money order payable to
"United States Treasury"

Dollars
7,670

[redacted]

Bruce J Whitten
Theresa A Whitten
102 Crab Apple Avenue
Crestview FL 32536

[redacted]