2023 Form 1 - Statement of Financial Interests

Filed with COE: 05/06/2024

General Information

Name: Charles Davis

PID 26063

AGENCY INFORMATION

Organization	Suborganization	Title
Inverness	Community Redevelopment Agency	Board Member

Disclosure Period

THIS STATEMENT REFLECTS YOUR FINANCIAL INTERESTS FOR CALENDAR YEAR ENDING DECEMBER 31, 2023 .

Primary Sources of Income

PRIMARY SOURCE OF INCOME (Over $2,500) (Major sources of income to the reporting person)
(If you have nothing to report, write “none” or “n/a”)

Name of Source of Income	Source's Address	Description of the Source's Principal Business Activity
Chas. E. Davis Funeral Home, Inc	3075 So. Florida Ave	Mortuary and Cremation Services
Stock Dividends, Bond Interest, Retirement Required Minimum Distributions	Edward D. Jones Co.	Investments and Financial Planning
Brannen Banks	Inverness, FL	Banking Services
Cadance Banks	Inverness, FL	Banking Services
Insight Credit Union	Inverness, FL	Banking Services
Truist Banks	Inverness, FL	Banking Services

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Secondary Sources of Income

SECONDARY SOURCES OF INCOME (Major customers, clients, and other sources of income to businesses owned by the reporting person) (If you have nothing to report, write “none” or “n/a”)

Name of Business Entity	Name of Major Sources of Business' Income	Address of Source	Principal Business Activity of Source
Chas. E. Davis Funeral Home	Sales of mortuary & cremation services	3075 So. Florida Ave	Mortuary / Crematory Sales

Real Property

REAL PROPERTY (Land, buildings owned by the reporting person)
(If you have nothing to report, write “none” or “n/a”)

Location/Description
Commercial Property on US Hwy 41 South, Inverness, FL
Additional highway frontage, Floral City, FL

Intangible Personal Property

INTANGIBLE PERSONAL PROPERTY (Stocks, bonds, certificates of deposit, etc. over $10,000)
(If you have nothing to report, write “none” or “n/a”)

Type of Intangible	Business Entity to Which the Property Relates
Bank Cash Accounts	Chas. E. Davis Funeral Home
Certificates of Deposit	Charles & Lou Ellen Davis
Mutual Funds	Charles & Lou Ellen Davis
Stock Portfolio	Charles & Lou Ellen Davis

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Liabilities

LIABILITIES (Major debts valued over $10,000):
(If you have nothing to report, write “none” or “n/a”)

Name of Creditor	Address of Creditor
N/A	

Interests in Specified Businesses

INTERESTS IN SPECIFIED BUSINESSES (Ownership or positions in certain types of businesses)
(If you have nothing to report, write “none” or “n/a”)

Business Entity # 1
N/A

Training

This section applies only to an appointed school superintendent, or a commissioner of a community redevelopment agency created under Part III, Chapter 163, 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.

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Signature of Filer

Charles Davis

Digitally signed: **05/06/2024**

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