

2024 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/02/2025

General Information

Name: Hon Bonnie Jean Helms

CONFIDENTIAL

PID 257338

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (16Th)	Elected Constitutional Officer	Circuit Judge

Net Worth

My Net Worth as of December 31, 2024 was \$ 1,148,438.00.

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 \$ 20,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
{REDACTED} Residence-Address Exempt	\$ 1,300,000.00
Wells Fargo Bank Checking and Savings Accounts	\$ 6,911.00
Nationwide-457(b)-Detail of holdings over \$1,000 attached	\$ 132,316.00
UBS SEP IRA-Detail of holdings over \$1,000 attached	\$ 45,885.00
Schwab Def. Comp-Detail of holdings over \$1,000 attached	\$ 10,655.00
2018 Kia Sportage	\$ 9,000.00
Northwestern Mutual Life Insurance Cash Value	\$ 11,025.00
UBS Investment Growth and Income Account-Detail of holdings attached	\$ 186,394.00
UBS Checking/Savings Account	\$ 27,679.00
UBS Roth IRA-Detail of holdings over \$1,000 attached	\$ 8,079.00
Bonnie Lynne Helms Living Trust-Beneficiary	\$ 40,000.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Flagstar Bank	515 Corporate Drive, Troy, Michigan 48098-2639	\$ 450,662.00
Discover Home Loans	1 Corporate Drive, Suite 360, Lake Zurich, IL 60047-8945California	\$ 95,987.00
USAA	9800 Fredericksburg Rd, San Antonio, Texas 78288	\$ 2,857.00

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	200 E. Gaines St., Tallahassee, FL 32399	\$ 156,540.00
UBS Growth Income Account-Interest Income	1800 N. Military Trail, Suite 300, Boca Raton, FL 33431	\$ 2,008.00

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

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.

Bonnie Jean Helms

Digitally signed: 06/02/2025

Filed with COE: 06/02/2025



Schwab Personal Choice Retirement Account® (PCRA) of
STATE OF FLORIDA TTEE
STATE OF FLORIDA DEF COMP
FBO BONNIE JEAN HELMS

Statement Period
December 1-31, 2024

Investment Detail - Bank Sweep

Bank Sweep

CHARLES SCHWAB BANK

Total Bank Sweep ^{A,B}

Total Bank Sweep

	Starting Balance	Ending Balance	% of Account Assets
	267.14	342.53	3%
	267.14	342.53	3%
		342.53	3%

Investment Detail - Equities

Equities

ARES CAP CORP ^o

CLASS EQUITY

SYMBOL: ARCC

Total Equities

Quantity	Market Price	Market Value	% of Account Assets	Unrealized Gain or (Loss)	Estimated Yield	Estimated Annual Income
269.2180	21.89000	5,893.18	55%	417.74	8.77%	516.90
		5,475.44				
269.2180		5,893.18	55%	417.74		516.90
		5,475.44				

Estimated Annual Income ("EAI") and Estimated Yield ("EY") calculations are for informational purposes only. The actual income and yield might be lower or higher than the estimated amounts. EY is based upon EAI and the current price of the security and will fluctuate. For certain types of securities, the calculations could include a return of principal or capital gains in which case EAI and EY would be overstated. EY and EAI are not promptly updated to reflect when an issuer has missed a regular payment or announced changes to future payments, in which case EAI and EY will continue to display at a prior rate.

Schwab has provided accurate gain and loss information wherever possible for most investments. Cost basis data may be incomplete or unavailable for some of your holdings. Please see "Endnotes for Your Account" section for an explanation of the endnote codes and symbols on this statement.



Schwab Personal Choice Retirement Account® (PCRA) of
STATE OF FLORIDA TTEE
STATE OF FLORIDA DEF COMP
FBO BONNIE JEAN HELMS

Statement Period
December 1-31, 2024



Investment Detail - Exchange Traded Funds

Exchange Traded Funds		Quantity	Market Price	Market Value Cost Basis	% of Account Assets	Unrealized Gain or (Loss)	Estimated Yield	Estimated Annual Income
VANGUARD TOTAL INTERNATIONAL STK ETF SYMBOL: VXUS		75.0000	58.93000	4,419.75 3,443.20	41%	976.55	6.82%	301.47
Total Exchange Traded Funds		75.0000		4,419.75 3,443.20	41%	976.55		301.47

Estimated Annual Income ("EAI") and Estimated Yield ("EY") calculations are for informational purposes only. The actual income and yield might be lower or higher than the estimated amounts. EY is based upon EAI and the current price of the security and will fluctuate. For certain types of securities, the calculations could include a return of principal or capital gains in which case EAI and EY would be overstated. EY and EAI are not promptly updated to reflect when an issuer has missed a regular payment or announced changes to future payments, in which case EAI and EY will continue to display at a prior rate.

Total Investment Detail	10,655.46
Total Account Value	10,655.46
Total Cost Basis	8,918.64

457(b) Salary Reduction

NATIONWIDE

Investment option	Previous quarter balance	Contributions/Transfers In	Exchanges	Dividends*	Investment gain/loss & Interest ¹	Fees/Charges	Withdrawals/Transfers Out	Units/Shares	Units/Shares price	Current quarter balance
Specialty Vngird RealEst Indx Inst ¹¹								40,407.75		\$3,794.21
Small cap SmCap Val Eq D ¹										\$2,519.34
Wasatch SmCap Gr Inst ²										\$2,556.58
International AmFds New Wld R6 ³										\$6,678.98
TRowePr Ovrseas Stk II ¹¹										\$10,715.52
Vngird Ttl IntStkIndx Inst ¹										\$17,302.06
Mid cap JPM MidCap Val R6 ³										\$3,818.36
TRowePr US McCap Gr Eq D ¹										\$3,906.50
Large cap Fid Contra K6 ¹¹										\$6,737.88
TRowePr Divd Gr II ¹										\$6,478.21
TRowePr Eq Inc B ¹¹										\$15,323.01
TRowePr Gr Stk B ¹										\$9,540.22
Vngird Inst Indx Inst Pls ¹¹										\$10,658.82
Bonds AmFds Emrg Mkt Bd R6 ³										\$2,656.02
DodgeCox Inc I ¹										\$16,118.83
TRowePr Spectrm Inc I ¹										\$5,387.77
Short term Fixed Assets										\$8,123.72
Total										\$132,316.03

¹ May consist of c² Gain/loss is the difference between the account balance on the first and last day of the period, after allowing for the effects of transactions¹¹ Fund is valued in shares rather than units

UBS IRA HOLDINGS OVER \$1,000

ISHARES CORE MSCI ETF	1,265.00
ISHARES BROAD USD INVT GRADE CORP BOND ETF	1,407.00
SCHWAB US BROAD MKT ETF	2,497.00
ISHARES US TREASURY BOND	1,240.92

UBS SEP IRS HOLDINGS OVER \$1,000

ISHARES CORE MSCI EAFE ETF	7,309.00
ISHARES CORE MSCI EMERGING MARKETS ETF	2,715.00
VANGUARD VALUE ETF	1,354.00
VANGUARD MID-CAP ETF	2,377.00
VANGUARD RUSSELL GROWTH	2,873.00
VANGUARD RUSSELL 1000 GROWTH ETF	2,273.00
VANGUARD RUSSELL 1000 VALUE ETF	3,331.00
VANGUARD RUSSELL 2000 ETF	1,429.00
ISHARES 20+ YEAR TREAS BOND ETF	1,834.00
ISHARES JP MORGAN USD EMER MARKETS BOND ETF	1,781.00
ISHARES BROAD USD INVT GRADE CORP BOND ETF	8,296.00
ISHARES BROAD USD HIGH YIELD BOND ETF	2,759.25
VANGUARD INTERIM TREAS ETF	3,248.00



ACCESS
December 2024

Account name: BONNIE J HELMS
Friendly account name: Growth/Income
Account number: [REDACTED]

THE PREMIER WEAL

Your assets • Equities • Common stock (continued)

Holding	Trade date	Number of shares	Purchase price/ Average price per share (\$)	Cost basis (\$)	Price per share on Dec 31 (\$)	Value on Dec 31 (\$)
BLACKROCK INC						
Symbol: BLK Exchange: NYSE						
EAI: \$122 Current yield: 1.98%						
Security total						
BROADCOM INC						
Symbol: AVGO Exchange: OTC						
EAI: \$151 Current yield: 1.02%						
Security total						
CHUBB LTD CHF						
Symbol: CB Exchange: NYSE						
EAI: \$58 Current yield: 1.31%						
CHF Exchange rate: 0.90625						
Security total						
COCA COLA CO COM						
Symbol: KO Exchange: NYSE						
EAI: \$146 Current yield: 3.13%						
Security total						
EATON CORP PLC						
Symbol: ETN Exchange: NYSE						
EAI: \$19 Current yield: 1.15%						
Security total						
EXXON MOBIL CORP						
Symbol: XOM Exchange: NYSE						
EAI: \$115 Current yield: 3.69%						
Security total						



ACCESS
December 2024

Account name: BONNIE J HELMS
Friendly account name: Growth/Income
Account number: [REDACTED]

THE PREMIER WEAL

Your assets (continued)

Equities

Common stock

Holding	Trade date	Number of shares	Purchase price/ Average price per share (\$)	Cost basis (\$)	Price per share on Dec 31 (\$)	Value on Dec 31 (\$)
ABBOTT LABS						
Symbol: ABT Exchange: NYSE						
EAI: \$123 Current yield: 2.09%						
Security total						
ABBVIE INC COM						
Symbol: ABBV Exchange: NYSE						
EAI: \$144 Current yield: 3.68%						5,881.72
Security total						
ACCENTURE PLC IRELAND CL A						
Symbol: ACN Exchange: NYSE						
EAI: \$71 Current yield: 1.68%						3,909.40
Security total						
AMER EXPRESS CO						
Symbol: AXP Exchange: NYSE						
EAI: \$45 Current yield: 0.95%						4,221.48
Security total						
ANALOG DEVICES INC						
Symbol: ADI Exchange: OTC						
EAI: \$81 Current yield: 1.73%						4,748.64
Security total						
AUTOMATIC DATA PROCESSING INC						
Symbol: ADP Exchange: OTC						
EAI: \$123 Current yield: 2.10%						4,674.12
Security total						
Security total						
						5,854.60

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ACCESS
December 2024

Account name: BONNIE J HELMS
Friendly account name: Growth/Income
Account number: [REDACTED]

THE PREMIER V

Your assets • Equities • Common stock (continued)

Holding	Trade date	Number of shares	Purchase price/ Average price per share (\$)	Cost basis (\$)	Price per share on Dec 31 (\$)	Value on Dec 31 (\$)
HOME DEPOT INC						
Symbol: HD Exchange: NYSE						
EAI: \$162 Current yield: 2.31%						
Security total						
JOHNSON & JOHNSON COM						
Symbol: JNJ Exchange: NYSE						
EAI: \$164 Current yield: 3.44%						
Security total						
JPMORGAN CHASE & CO						
Symbol: JPM Exchange: NYSE						
EAI: \$165 Current yield: 2.09%						
Security total						
KLA CORP						
Symbol: KLAC Exchange: OTC						
EAI: \$20 Current yield: 1.06%						
Security total						
LINDE PLC NEW EUR						
Symbol: LIN Exchange: OTC						
EAI: \$56 Current yield: 1.34%						
EUR Exchange rate: 0.96571						
Security total						
MARSH & MCLENNAN COS INC						
Symbol: MMC Exchange: NYSE						
EAI: \$55 Current yield: 1.52%						
Security total						



Account name: BONNIE J HELMS
Friendly account name: Growth/Income
Account number: [REDACTED]

THE PREMIER WEALTH

Your assets • Equities • Common stock (continued)

Holding	Trade date	Number of shares	Purchase price/ Average price per share (\$)	Cost basis (\$)	Price per share on Dec 31 (\$)	Value on Dec 31 (\$)
MCDONALDS CORP Symbol: MCD Exchange: NYSE EAI: \$92 Current yield: 2.44%						
Security total						3,768.57
MICROSOFT CORP Symbol: MSFT Exchange: OTC EAI: \$166 Current yield: 0.79%						
Security total						21,075.00
MORGAN STANLEY Symbol: MS Exchange: NYSE EAI: \$155 Current yield: 2.94%						
Security total						5,280.24
NEXTERA ENERGY INC COM Symbol: NEE Exchange: NYSE EAI: \$142 Current yield: 2.87%						
Security total						4,946.61
ORACLE CORP Symbol: ORCL Exchange: NYSE EAI: \$66 Current yield: 0.97%						
Security total						6,832.24
PHILLIPS 66 Symbol: PSX Exchange: NYSE EAI: \$133 Current yield: 4.03%						
Security total						3,303.97
PROCTER & GAMBLE CO Symbol: PG Exchange: NYSE EAI: \$97 Current yield: 2.41%						

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ACCESS
December 2024

Account name: BONNIE J HELMS
Friendly account name: Growth/Income
Account number: [REDACTED]

THE PREMIER WEALTH

Your assets • **Equities** • Common stock (continued)

Holding	Trade date	Number of shares	Purchase price/ Average price per share (\$)	Cost basis (\$)	Price per share on Dec 31 (\$)	Value on Dec 31 (\$)	9%
Security total							
PROLOGIS INC COM							
Symbol: PLD Exchange: NYSE							
EAI: \$184 Current yield: 3.63%							
24,000							
168.136							
4,035.26							
4,023.60							
Security total							
REPUBLIC SERVICES INC							
Symbol: RSG Exchange: NYSE							
EAI: \$19 Current yield: 1.18%							
1,609.44							
Security total							
TAIWAN SEMICONDUCTOR MFG CO							
LTD ADR							
Symbol: TSM Exchange: NYSE							
EAI: \$88 Current yield: 0.99%							
8,887.05							
Security total							
TEXAS INSTRUMENTS							
Symbol: TXN Exchange: OTC							
EAI: \$125 Current yield: 2.90%							
4,312.73							
Security total							



ACCESS
December 2024

Account name: BONNIE J HELMS
Friendly account name: Growth/Income
Account number: [REDACTED]

THE PREMIER WI

Your assets • Equities • Common stock (continued)

Holding	Trade date	Number of shares	Purchase price/ Average price per share (\$)	Cost basis (\$)	Price per share on Dec 31 (\$)	Value on Dec 31 (\$)
TJX COS INC NEW						
Symbol: TJX Exchange: NYSE						
EAI: \$77 Current yield: 1.25%						
Security total						
TRANE TECHNOLOGIES PLC						
Symbol: TT Exchange: NYSE						
EAI: \$34 Current yield: 0.92%						
Security total						
UNION PACIFIC CORP						
Symbol: UNP Exchange: NYSE						
EAI: \$107 Current yield: 2.35%						
Security total						
UNITEDHEALTH GROUP INC						
Symbol: UNH Exchange: NYSE						
EAI: \$101 Current yield: 1.66%						
Security total						
Total						
Total estimated annual income						

Your total assets

	Value on Dec 31 (\$)	Percentage of your account	Cost basis (\$)	Estimated annual income (\$)
Cash	3,274.86	1.76%	3,274.86	
Equities	183,119.28	98.24%	183,023.23	
Total	\$186,394.14	100.00%	\$186,298.09	