

General Information

Name: Com William George Truex

PID 228990

AGENCY INFORMATION

Organization	Suborganization	Title
Charlotte County	Elected Constitutional Officer	County Commissioner, District 3

Net WorthMy Net Worth as of May 21, 2025 was \$ 2,402,583.45.**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 \$ 148,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Home located at 5 Long Meadow Place Rotonda West FL 33947	\$ 712,500.00
Truist Bank Cash on hand	\$ 57,391.94
50% Ownership Truex Preferred Construction	\$ 1,125,000.00

2024 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 07/01/2025

Description of Asset	Value of Asset
FRS U.S. Stock Market Index Fund (120)	\$ 74,603.50
FRS U.S. Stock Fund (340)	\$ 90,869.89
FRS Global Stock Fund (210)	\$ 18,802.06
AAPL Apple Inc	\$ 3,806.55
ABBV ABBVIE INC COM	\$ 1,105.56
ADSK AUTODESK INC	\$ 1,469.90
AJG AURTHUR GALLAHER CO	\$ 6,213.56
AMGN AMGEN INC	\$ 2,749.20
AMLP ALPS ETF TR ALERIAN MLP	\$ 2,859.33
AMZN AMAZON	\$ 2,010.20
ANET ARISTA NETWORKS INC COM SHS	\$ 1,692.27
APH AMPHENOL CORP CLASS A	\$ 5,255.45
AVGO BROADCOM INC COM	\$ 5,402.32
FIDELITY GOVERNMENT CASH RESERVES	\$ 42,038.35
BLK BLACKROCK INC COM	\$ 3,359.76
BRKB BERKSHIRE HATHAWAY INC COM	\$ 8,453.88
CEG CONSTELLATION ENERGY CORP	\$ 2,294.64
CLOI VANECK ETF TR CLO ETF	\$ 3,699.28
COST COSTCO WHOLESALE CORP COM	\$ 6,742.07
CPRT COPART INC COM USDO.0001	\$ 4,177.31
CRWD CROWDSTRIKE HLDGS INC CL A	\$ 2,178.10
CTA SIMPLIFY EXCHANGE TRADED FUNDS	\$ 5,285.52
CTAS CINTAS	\$ 2,446.57
DLR DIGITAL REALTY TRUST INC	\$ 1,383.71
FTLS FIRST TR EXCHANGE TRADED FD	\$ 3,321.36
UNITED STATES TREAS SER BL-2024	\$ 20,896.05
GOOG ALOHABET INC CAP STK CL C	\$ 15,717.44
HD HOME DEPOT INC	\$ 3,652.32
HEI HEICO CORP NEW COM	\$ 1,939.06

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Description of Asset	Value of Asset
BLACKROCK INC COM USD0.01 (BLK)	\$ 3,232.87
IBKR INTERACTIVE BROKERS GROUP	\$ 6,100.86
IBMP ISHARES TRUST IBONDS	\$ 7,286.24
IBMQ ISHARES TR IBONDS DEC 28	\$ 7,297.16
IBMR ISHARES TR 7-10 YR TRSY BD	\$ 7,271.52
ICE INTERCONTINENTAL EXCHANGE	\$ 1,235.50
IEF ISHARES TR 7-10 TRSY BD	\$ 3,664.36
ISRG INTUITIVE SURGICAL INC	\$ 2,227.52
EXXON MOBIL CORP COM	\$ 2,483.67
KO COCA-COLA CO	\$ 3,541.70
LLY ELI LILLY & CO COM	\$ 6,026.71
LMT LOCKHEED MARTIN CORP	\$ 3,673.96
LSEQ HARBOR ETF TRUST LONG-SHORT	\$ 3,685.64
MA MASTERCARD INCORPORATED	\$ 3,483.48
MCD MCDONALDS S CORP	\$ 3,368.76
META METAPLATFORMS INC CLASS A	\$ 1,913.29
MARTIN MARIETTA MATERIALS INC COM USD0.01 (MLM)	\$ 2,793.75
MSFT MICROSOFT CORP	\$ 4,836.11
MSI MOTOROLA SOLUTIONS INC	\$ 3,433.81
NEE NEXTERA ENERGY INC COM USD	\$ 4,874.02
NFLX NETFLIX INC	\$ 2,396.66
NOW SERVICENOW INC COM USD0.01	\$ 1,010.54
PARKER-HANNIFIN CORP COM (PH)	\$ 3,851.96
NVDA NVIDIA CORPORATION COM	\$ 1,359.20
ORLY OREILLY AUTOMOTIVE INC COM	\$ 1,126.16
PANW PALO ALTO NETWORKS INC COM	\$ 2,519.58
PAYX PAYCHEX INC COM USD0.01	\$ 4,700.70
PGR PROGRESSIVE CORP COM	\$ 2,307.03
PLTR PALANTIR TECHNOLOGIES INC CL A	\$ 1,268.90

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Description of Asset	Value of Asset
PM PHILIP MORRIS INTERNATIONAL	\$ 1,559.73
PSQ PROSHARES TR SHORT S&P 500	\$ 2,341.13
QDSIZ AQR DIVERSIFYING STRATEGIES	\$ 20,865.29
RCL ROYAL CARRIBEAN GROUP COM	\$ 1,026.80
RMD REMED INC	\$ 4,461.31
ROP ROPER TECHNOLOGIES INC	\$ 2,304.62
SH PROSHARES TR SHORT S&P 500	\$ 2,341.13
SHM SPDR NEVEEN BLOOMBERG	\$ 21,287.95
SHW SHERWIN WILLIAMS CO	\$ 1,429.19
SPGI S&P GLOBAL INC COM	\$ 2,085.21
SUB ISHARES SHORT-TERM NATIONAL	\$ 3,489.07
VANGUARD BALANCED INDEX FD INCSYK STRYKER CORORATION COM TOTAL BND MRKT (BND)	\$ 5,254.41
Capital One Bank	\$ 99,406.96
UNP UNION PAC CORP COM	\$ 4,116.44
URI UNTIED RENTALS INC	\$ 3,582.86
USDU WISDOMTREE TR BLMBG US	\$ 2,543.34
V VISA INC	\$ 6,443.49
VNQI VANGUARD GLOBAL EX-US	\$ 2,185.00
VST VISTRA CORP COM	\$ 1,259.27
WM WASTE MANAGEMENT INC	\$ 4,007.79
WMT WALMART INC COM	\$ 2,637.43
XOM EXXON MOBILE CORP COM	\$ 2,735.80
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WMT WALMART INC COM	\$ 2,637.43
XOM EXXON MOBILE CORP COM	\$ 2,735.80

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Freedom Mortgage	P.O. BOX 619063 DALLAS, TX 75261-9063	\$ 165,580.71
US Small Business Administration	299 E Broward Blvd, Ft. Lauderdale FL33301	\$ 76,761.57
Citi	BOX 6500 SIOUX FALLS, SD 57117	\$ 10,168.80
Barclays	PO BOX 13337, Philadelphia, PA 19101-3337	\$ 5,005.13
5/3rd Bank	P.O Box 630412 Cincinnati OH 45263-0412	\$ 33,256.00
Freedom Mortgage	P.O. BOX 619063 DALLAS, TX 75261-9063	\$ 165,580.71
US Small Business Administration	299 E Broward Blvd, Ft. Lauderdale FL33301	\$ 76,761.57
Citi	BOX 6500 SIOUX FALLS, SD 57117	\$ 10,168.80
Barclays	PO BOX 13337, Philadelphia, PA 19101-3337	\$ 5,005.13
5/3rd Bank	P.O Box 630412 Cincinnati OH 45263-0412	\$ 33,256.00

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

Name of Creditor	Address of Creditor	Amount of Liability
Truist Commercial	PO Box 5850050, Charlotte NC 28258-0050	\$ 80,301.34
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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 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
Truex Preferred Construction, LLC	3797 S. Access Rd. Englewood FL 34224	\$ 102,000.00
Charlotte County Board of County Commissioners	18500 Murdock Circle Port Charlotte FL 33948	\$ 91,113.00
Truex Preferred Construction, LLC	3797 S. Access Rd. Englewood FL 34224	\$ 102,000.00
Charlotte County Board of County Commissioners	18500 Murdock Circle Port Charlotte FL 33948	\$ 91,113.00

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

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.

William George Truex

Digitally signed: 07/01/2025

Filed with COE: 07/01/2025