

2024 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 05/29/2025

General Information

Name: Ms Gloria Branch

CONFIDENTIAL

PID 311127

AGENCY INFORMATION

Organization	Suborganization	Title
Palm Beach County School Board	Elected Constitutional Officer	

Net Worth

My Net Worth as of December 31, 2024 was \$ 3,625,227.00.

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 \$ 233,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
{REDACTED}	\$ 3,000,000.00
Truist Bank	\$ 19,442.00
Stifel	\$ 633,922.00
Anchor Bank	\$ 2,535.00
Campaign Loan	\$ 5,000.00
Lexus Financial	\$ 19,770.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
New Rez Mortgage	PO Box 619063 Dallas TX 75261	\$ 279,457.00
Lexus Financial	PO Box 4102 Carol Stream IL 60197	\$ 8,985.00

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
Palm Beach County School District	3300 Forest Hill Blvd West Palm Beach FL 33406	\$ 16,243.00
C3 Complete	110 E Atlantic Avenue Suite 420 Delray Beach FL 33444	\$ 5,933.00

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.

Gloria Branch

Digitally signed: 05/29/2025

Filed with COE: 05/29/2025

PORTFOLIO ASSETS - HELD AT STIFEL

Equities	Symbol/ Type	Quantity	Current Price/ Current Value	Average Unit Cost/ Cost Basis	Unrealized Gain/(-)Loss ⁹⁰	Estimated Annualized Income	Estimated Yield %
APPLE INC	AAPL	255.289	63,929.47				
BOEING COMPANY	BA	50.992	9,025.58				
CITIGROUP INC	C	366.601	25,805.04				
MICROSOFT CORP	MSFT	131.295	55,340.84				
PAYPAL HOLDINGS INC	PYPL	150	12,802.50				

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STIEEL

John P
2024

GLORIA S BRANCH IRA

December 31, 2024

ASSET DETAILS (continued)

PORTFOLIO ASSETS - HELD AT STIEEL (continued)

Equities	Symbol/ Type	Quantity	Current Price/ Current Value	Average Unit Cost/ Cost Basis	Unrealized Gain/(-)Loss ¹⁰	Estimated Annualized Income	Estimated Yield %
BLOCK INC	SQ	150	12,748.50	41,126.28			
CL A							
ISHARES S&P 500 GROWTH ETF	IWV	564,746	57,338.66	44,093.60			
INDUSTRIAL SELECT SECTOR SPDR ETF	XLI	256,129	33,747.55	28,120.05			
Total Equities			\$270,738.14	\$236,697.64	\$34,040.54	\$2,275.23	0.84%
Preferreds	Symbol/ Type	Quantity	Current Price/ Current Value	Average Unit Cost/ Cost Basis	Unrealized Gain/(-)Loss ¹⁰	Estimated Annualized Income	Estimated Yield %
APOLLO GLOBAL MANAGEMENT INC FXD RT RESET JR SUB NOTE FXDVAR 09/15/2053	APOS	2,193,936	58,117.36	56,337.22			
ATHENE HOLDINGS LTD JR SUB DEBENTURE	ATHS	1,000	25,070.00	25,541.22			
Total Preferreds			\$83,187.36	\$81,878.44			
Open-End Funds							
Mutual Funds	Symbol/ Type	Quantity	Current Price/ Current Value	Average Unit Cost/ Cost Basis	Original Investment/ Cumulative Return ⁸	Unrealized Gain/(-)Loss ¹⁰	Estimated Annualized Income
MONEY MARKET OBLIGS FEDERATED HERMES PRIME CASH OBLIGS CL CII	PCDXX	421,820	421.82				

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STIFEEL

Colin P. 2024

GLORIA S BRANCH IRA

December 31, 2024

ASSET DETAILS (continued)

PORTFOLIO ASSETS - HELD AT STIFEEL (continued)

Mutual Funds	Symbol/ Type	Quantity	Current Price/ Current Value	Average Unit Cost/ Cost Basis	Original Investment/ Cumulative Return ⁸	Unrealized Gain/(-)Loss ¹⁰	Estimated Annualized Income	Estimated Yield %
Closed-End Funds	ARES CAPITAL CORP	ARCC	5,671.818	124,156.09				
	NEUBERGER BERMAN ENERGY INFRASTRUCTURE & INCOME FUND	NML	2,236.260	19,746.17				
Total Mutual Funds								
Total Portfolio Assets - Held at Stifel			\$498,249.58					
Total Net Portfolio Value			\$501,324.79					

FOOTNOTE DEFINITIONS

- 7 **Original Investment:** Total cost invested and held in the account as of month-end. Items may be adjusted for corporate actions, return of capital, or other miscellaneous adjustments, which may affect cost basis. Excludes purchases through automatic reinvestment of capital gains and dividends.
- 8 **Cumulative Return:** Current Value minus Original Investment. Cumulative Return is the capital appreciation (depreciation) of the entire purchased security, including purchases through automatic reinvestment of capital gains and dividends. Cumulative Return may not be accurate if any purchased shares are sold or transferred. Shares purchased at a prior firm through automatic reinvestment of capital gains and dividends that are subsequently transferred into the Stifel account may be treated as "Original Investment" shares if appropriate coding is not supplied by the prior firm when transferred.
- 10 Please note "Unrealized Gain/(-)Loss" does not equal the total current value minus the total cost if any value or cost amounts are missing. Unrealized gains or losses are provided for your information only and should not be used for tax purposes.

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PORTFOLIO ASSETS - HELD AT STIFEL

Equities	Symbol/ Type	Quantity	Current Price/ Current Value	Average Unit Cost/ Cost Basis	Unrealized Gain/(-)Loss ¹⁰	Estimated Annualized Income	Estimated Yield %
AGNC INVESTMENT CORP	AGNC	1,727.166	15,907.19				
CARNIVAL CORP PAIRED CTF	CCL	210.615	5,248.52				
1 COM CARNIVL CRP & 1 TR							
SH BEN INT P&O PRINCESS							
INDUSTRIAL SELECT SECTOR	XLI	189.535	24,973.13				
SPDR ETF							
Total Equities			\$46,128.84	\$52,500.30			
Total Portfolio Assets - Held at Stifel			\$46,128.84	\$52,500.30			
Total Net Portfolio Value			\$46,507.84	\$52,879.30			

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Estimated

PORTFOLIO ASSETS -				
Symbol/	Quantity	Current Price/ Current Value	Average Unit Cost/ Cost Basis	
Stifel Smart Rate Program				
STIFEL SMART RATE				
STIFEL BANK & TRUST				
Cash	79,718.400	79,718.40		
Total Stifel Smart Rate Program		\$79,718.40	\$79,718.40	
Stifel Smart Rate is a FDIC insured bank deposit held in Stifel's name for the benefit of clients, not cash held in your securities account and not covered by SIPC.				
Total Portfolio Assets - Held at Stifel		\$79,718.40	\$79,718.40	
Total Portfolio Assets - Held at Stifel		\$79,718.90	\$79,718.90	
Total Net Portfolio Value				

Wesley North