2024 Form 1 - Statement of Financial Interests

Filed with COE: 06/30/2025

General Information

Name: Mr Allan Kaulbach

PID 275319

AGENCY INFORMATION

Organization	Suborganization	Title
Atlantis	City Council	Mayor

Disclosure Period

THIS STATEMENT REFLECTS YOUR FINANCIAL INTERESTS FOR CALENDAR YEAR ENDING DECEMBER 31, 2024.

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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
Marsh&Mclennan Cos	Ave of Americas, NY	Financial Services
Prudential Financial	Broad Street, Newark,NJ	Financial Services
Raymond James	Carrilon Parkway, Saint Petersburg, FL	Financial Services
Fidelity Investments	Summer Street, Boston, MA	Financial Services
LPL Financial	Executive Drive, San Diego, CA	Financial Services
JP Morgan Chase	Columbus, Ohio	Financial Services
US Railroad Retirement	Rush Street, Chicago, Ill	US Government Retirement
Northern Trust	LaSalle Street, Chicago, Illinois	Financial Services
Prudential Retirement	Scranton, PA	Financial Services
Chevron Corp	Smith Street, Houston, TX	Oil & Gas
Starwood Property Trust	Collins Ave, Miami, FL	Real Estate
EOG Resources	Bagby Street, Houston, TX	Oil & Gas
General Dynamics Corp	Sunset Hills Road, Reston, VA	Aerospace & Defense
Qualcom	Morehouse Drive, San Diego, CA	Technology
Lockheed Martin	Rockledge Drive, Bethesda, MD	Aerospace & Defense
United Parcel Service	Glenlake Parkway, Atlanta, Ga	Transportation & Logistics
Citigroup	Greenwich Street, New York, NY	Financial Services
US Treasury	1500 Pennsylvania Ave, Washington DC	US Gov't

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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
N/A			

Real Property

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

Location/Description
N/A

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 accounts	JPMorgan Chase
bank accounts	Wells Fargo Bank
brokerage account	Raymond James Financial Services
brokerage account	Fidelity Investments
brokerage account	Lido Advisors
brokerage account	LPL Financial
treasury bills	US Treasury
stock	Marsh & McLennan Companies
stock	Idacorp
stock	JPM Morgan Chase
stock	Citigroup

Type of Intangible	Business Entity to Which the Property Relates
stock	Chevron
stock	Prudential Financial Inc
stock	General Dynamics Corp
stock	Lockheed Martin Corp
stock	United Parcel Service
stock	Starwood Property Trust
stock	Qualcom
stock	Alphabet
stock	Kinder Morgan Inc
stock	FCX
stock	LNG
stock	SLB
stock	Cleveland Cliffs
stock	APA
stock	Apple
stock	Pfizer
stock	Amgen
stock	Devon
stock	MGM
stock	General Motors
stock	State Street Corp.
stock	Viper Energy
stock	Dell
stock	Nvidia
stock	Amazon
stock	Ilumina
stock	Truist Financial
stock	BHP
stock	AT&T
stock	Verizon
stock	Conoco Phillips
stock	Enbridge
stock	Skyworks
stock	Crisper Therapeutics

Type of Intangible	Business Entity to Which the Property Relates
preferred stock	Bank of America
preferred stock	Prudential Financial
preferred stock	JP Morgan Chase
preferred stock	Morgan Stanley
preferred stock	US Bancorp
preferred stock	Charles Schwab
preferred stock	Allstate
preferred stock	Metropolitan Life
preferred stock	Truist Financial
bond	Keycorp
bond	Citigroup
bond	JP Morgan Chase
stock	Abbvie
stock	Regions Financial
stock	RRC
stock	Palantir Corp
stock	AMD
stock	VRT
stock	Macys
stock	Charles Schwab
bond	Goldman Sachs
stock	MGM
stock	KLC
stock	PDI
stock	PFE
stock	Salesforce
stock	Draftkings
stock	Wells Fargo
stock	Robinhood
stock	TNDM
stock	Newmont Mining
stock	Home Depot
stock	Gilead Sciences
stock	Micron

Type of Intangible	Business Entity to Which the Property Relates
stock	Bristol Myers
stock	United Healthcare
stock	Next Era Energy
stock	Live Nation
stock	Mosaic
stock	Simon Property Group
stock	MARA
stock	PSX
stock	Moderna
stock	SOFI
stock	Uber
stock	Rio Tinto
stock	SLV
stock	AES Corp
stock	VST
stock	CTRA
stick	FPE
stock	HYBL
stock	SBLK
stock	ZM
stock	INSM

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
Volvo Car Financial Services	Mobile, Alabama

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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, an elected municipal officer, elected local officer of an independent special district 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.

Signature of Filer

Allan Edward Kaulbach

Digitally signed: **06/30/2025**

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