2024 Form 1 - Statement of Financial Interests

Filed with COE: 06/19/2025

General Information

Name: Mr James Alexander Fitzpatrick

PID 311807

AGENCY INFORMATION

Organization	Suborganization	Title
Bonita Springs	Council	Council Member

Disclosure Period

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

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
City of Bonita Springs	9101 Bonita Beach Road	City Council
Charles Schwab	Westlake, TX	IRA Distributions
National Financial Services	Albuquerque, NM	Pension Distribution
Albright Solutions BPS	The Woodlands, TX	Retirement Plan Distribution
Prudential Tax Services	Scranton, PA	Retirement Plan Distribution
Empower Trust Company	Denver, CO	Retirement Plan Distribution
Inspira Financial Trust	Plano, TX	Retirement Plan Distribution

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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

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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
Annuity	Prudential
Annuity	Lincoln Financial
Rollover IRA	DTGHF
Rollover IRA	HBANL
Rollover IRA	HBAN
Rollover IRA	PDI
Rollover IRA	SWVXX
Rollover IRA	BTC
Rollover IRA	GBTC
Rollover IRA	DBA
Rollover IRA	PFM
Rollover IRA	PFF
Rollover IRA	ITA
Rollover IRA	GRW
Joint Brokerage	AAPL
Joint Brokerage	T
Joint Brokerage	AWX
Joint Brokerage	CGC
Joint Brokerage	HBAN
Joint Brokerage	WBD
Joint Brokerage	PFF

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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, 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.

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Signature of Filer

James Alexander Fitzpatrick

Digitally signed: **06/19/2025**

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