2024 Form 1 - Statement of Financial Interests

Filed with COE: 06/07/2025

General Information

Name: Treva Lea Roberts

PID 305391

AGENCY INFORMATION

Organization	Suborganization	Title
Lady Lake	Mayor And Town Council	Commissioner - Ward 1

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
Synchrony Bank	P.O. Box 669802 Dallas, Tx 75266	Financial Services Industry
Capital Group/American Funds	P.O. Box 2560 Norfolk, Va 23501	Investment Services Company
Betty Rodden	2402 Saffron Ln., The Villages, FL 32162	Rental Property
Keith DeSomer	1113 Pelion Pl, The Villages, FL 32162	Rental Property
Insight Credit Union	P.O. Box 4900 Orlando, FL 32802	Financial Services Industry
Charles Schwab & Co Inc	3000 Schwab Way, Westlake Tx 76262	Investment Services Company

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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
1113 Pelion Place, The Villages, FL 32162
2402 Saffron Lane, The Villages, FL 32162

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
Savings Account	Synchrony Bank, PO Box 669802, Dallas, Tx 75266
Checking Account	Insight Credit Union, PO Box 4900, Orlando, FL 32802
Annuity	Brighthouse Life Insurance Co., Charlotte, NC 28277
CD	Insight Credit Union PO Box 4900 Orlando, FL 32802
Money Market Sweep	Charles Schwab & Co Inc 3000 Schwab Way, Westlake, TX 76262
Money Fund Advantage	Charles Schwab & Co 3000 Schwab Way, Westlake, TX 76262
Mutual Fund - Growth Fund of America	Capital Group
Mutual Fund -American Balance Fund	Capital Group
Mutual Fund - Fundamental Investors	Capital Group
ETF Fund	ISHARES CORE S&P 500

Type of Intangible	Business Entity to Which the Property Relates
Stock	Astrazeneca PLC F.
Stock	AT&T
Stock	Broadcom Inc.
Stock	Cisco Systems Inc.
Stock	Citizens Financial Group Inc.
Stock	Conagra Brands Inc.
Stock	Corning Inc.
Stock	Duke Energy Corp.
Stock	Edison International
Stock	Enbridge Inc. F
Stock	Genuine Parts Co.
Stock	GSK PLC ADR F
Stock	HSBC Holdings PLC F
Stock	IBM Corp.
Stock	International Paper Co
Stock	JP Morgan Chase & Co.
Stock	LyondellBasell Industries F
Stock	MetLife Inc.
Stock	Novartis AG F
Stock	National Grid PLC F
Stock	Orange F
Stock	PNC Financial Svcs
Stock	Royal Bank of Canada F
Stock	Sanofi S A F
Stock	Seagate Technology HLD
Stock	Southern CO.
Stock	Unilever PLC
Stock	United Utilities
ETF Bond Fund	INVESTCO BULLETSHARES 2028
ETF BOND FUND	INVESTCO BULLETSHARES 2025
ETF BOND FUND	INVESTCO BULLETSHARES 2027
ETF BOND FUND	INVESTCO BULLETSHARES 2026
ETF BOND FUND	ISHARES ASIA/PACIFIC
ETF BOND FUND	ISHARES INTERNATIONAL DEV RL

Type of Intangible	Business Entity to Which the Property Relates
ETF BOND FUND	ISHARES LATION AMERICA 40
ETF BOND FUND	SPDR S & P EMERGING MARKETS
REIT	ANNALY CAPITAL MGMT
REIT	KIMCO REALTY CORP
REIT	PUBLIC STORAGE
CASH	PERSONAL
Stock	Koninklijke AHOLD DELH F
Stock	NTNL Fuel Gas Cp
Stock	Chevron Corp
Stock	APPLE Inc.
Stock	META Platforms Inc.
Stock	NVIDIA Corp
Stock	ServiceNOW Inc
Stock	United Parcel Service Inc.
Stock	Eli Lilly and Co
Stock	Costo Whsl Corp

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	

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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

Treva Lea Roberts

Digitally signed: **06/07/2025**

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