2024 Form 1 - Statement of Financial Interests

Filed with COE: 06/09/2025

General Information

Name: Ms Jo Lynn Nelson

PID 8864

AGENCY INFORMATION

Organization	Suborganization	Title
Titusville	City Council	

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
State of Florida	Dept. of Management Services Tallahassee	Pension
U.S. Social Security	Washington, DC	Social security
Roberts-Nelson Enterprise	P.O. Box 334, Scottsmoor, Fl.	Rental Income
Ameriprise Financial	Titusville, Florida	Investment income

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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
Roberts-Nelson Enterprise	Good Thymes Restaurant	1411 Garden St., Titusville, Fl.	Rental Income
Roberts-Nelson Enterprise	Space Coast Bait	1413 Garden Street, Titusville, Fl.	Rental income

Real Property

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

Location/Description
2354 Parrot Lane, Tallahassee, Florida
1411 Garden St., Titusville, Fl.
1413 Garden St., Titusville, Fl.
Lots behind 1411 and 1413 Garden St., Titusville, Fl.

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
Cash, CD	TD Bank
Cash	Ameriprise Financial
Mutual Fund	Investco Equity & Income CL A
Mutual Fund	Investco Equally Weighted S&P 500 CL A
Mutual Fund	BNY Mellon Small Mid Cap Growth CL C
Mutual Fund	Columbia Balanced CL A
Mutual Fund	Fidelity Invt Money Market Instl Cl

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Type of Intangible	Business Entity to Which the Property Relates
Mutual Fund	Goldman Sachs Income Builder CL A
Mutual Fund	Lord Abbett Bond Debenture CL C
Mutual Fund	MFS Moderate Allocation CL A
Mutual Fund	Nuveen High Yield Mun Bond CL C
Mutual Fund	Nuveen High Yield Mun Bond CL A
Mutual Fund	Nuveen All American Mun Bond CL A
Mutual Fund	PGIM Jennison Health Sciences CL A
Mutual Fund	Transamerica Asset Alloc Moderate CL
Stock	Kimberly Clark Corp.
Stock	Nextera Energy Inc.
Stock	General Motors Investors Co., Inc.
Stock, Exchange Traded Fund	Ishares Core High Dividend ETF
Mutual Fund	Blackrock High Yield Mun Instl CL
Mutual Fund	Fidelity Advisor Materials CL I
Mutual Fund	Pimco Income CL I2
Mutual Fund	T Rowe Price Dividend Growth Investor CL
Stock, ETF	Global X US Infrastructure Development ETF
Stock, ETF	SPDR Series Trust S&P Dividend ETF
Mutual Fund	Eaton Vance High Income Opptys CL I
Mutual Fund	Fidelity Advisor Utilities CL I
Mutual Fund	T Rowe Price Dividend Growth Investor CL
Stock, ETF	SPDR Series Trust S&P Dividend ETF
Stock, ETF	Sector Healthcare Select Sector SPDR ETF
Stock, ETF	Sector Consumer Staples Select Sector SPDR ETF
Stock, ETF	Vanguard Total Bond Market ETF
Stock, ETF	Vanguard Information Technology ETF
Mutual Fund	Columbia Contrarian Core CL A
Mutual Fund	Goldman Sachs Global Core Fixed Income CL A
Cash	NRS Florida Fixed Fund
Stock	T Rowe Price Dividend Growth Fund I Class
Stock	T Rowe Price Equity Income Trust B

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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
WellsFargo Bank	San Francisco, Ca.
Service Experts	Cocoa, Fl.

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

Jo Lynn Nelson

Digitally signed: **06/09/2025**

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