2024 Form 1 - Statement of Financial Interests

Filed with COE: 06/15/2025

General Information

Name: Ms Diana Lee Davis

PID 299031

AGENCY INFORMATION

Organization	Suborganization	Title
Juno Beach	Mayor And Town Council	Councilmember

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
Legacy Matters, P.A.	11231 U.S. Hwy One #137, North Palm Beach, FL 33408	Law Office
Charles Schwab Investments	150 E. Palmetto Park Road #100, Boca Raton, FL 33432	Financial Institution

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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
Legacy Matters, P.A.	client services	11231 U.S. Hwy One #137, North Palm Beach, FL 33408	law practice - client confidentiality attaches, Rules Regulating the Florida Bar 4-1.6

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”)

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Type of Intangible	Business Entity to Which the Property Relates
Stocks	ABBVIE INC
Stocks	ABBOTT LABORATORIES
Stocks	BANK OF AMERICA CORP
Stocks	CISCO SYSTEMS INC
Stocks	CHEVRON CORP
Stocks	DOMINION ENERGY INC
Stocks	DUKE ENERGY CORP
Stocks	ALPHABET INC. CLASS A
Stocks	HOME DEPOT INC
Stocks	LILLY ELI & CO
Stocks	MERCK & CO. INC.
Stocks	MICROSOFT CORP
Stocks	RTX Corp.
Fund	DWS GNMA
Pension	FIDELITY NET BENEFITS
401K Fund	BTC EQUITY INDEX J
401K Fund	BTC RUSSELL 3000 M
401K Fund	FIDELITY CONTRA FUND
401K Fund	FIDELITY BLUE CHIP GROWTH
401K Stock	NEXTERA ENERGY LESOP
401K Stock	NEXTERA ENERGY STOCK
401K Fund	LG GRWTH FUND BY TRP
401K Fund	JPM EQUITY INCOME
401K Fund	BR R2000 ALPHA
401K Fund	VANGUARD TARGET Blended fund
401K Fund	AF EUROPAC GROWTH
401K Fund	LS CORE PL FXINC D
bank accounts	TD Bank
Corporation	Legacy Matters, P.A.
401K Fund	Fidelity Earnest CP Core Fund

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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.

Filed with COE: 06/15/2025

Signature of Filer

Diana Lee Davis

Digitally signed: **06/15/2025**

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