2024 Form 1 - Statement of Financial Interests

Filed with COE: 06/18/2025

General Information

Name: Ms Penelope P Gold

CONFIDENTIAL

PID 281263

AGENCY INFORMATION

Organization	Suborganization	Title
Longboat Key	Mayor And Town Commission	Town Commissioner District 2

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
RW Baird Private Asset Management	777 East Wisconsin Ave, Milwaulkee, WI 53202	Investment firm
Social Security	6401 Security Blvd., Baltimore, MD 21235	Federal social security program

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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 account	Republic Bank and Trust, 610 W. Market Street., Louisville, KY 40202
Financial Services account	Raymond James, 1819 Main Street, Suite 600, Sarasota, FL 34236
Taxable Bond Funds	Robert W Baird & Co., Inc.
Stocks, IRAs, Equities	Robert W. Baird & Co., Inc.
Cash and cash equivalents	Robert W. Baird & Co., Inc.
DFI	Robert W. Baird & Co., Inc.
Fixed Income	Robert W. Baird & Co., Inc.
Personal trust	Robert W. Baird & Co., Inc.
See Attached	

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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: 06/18/2025

Signature of Filer

Penelope P Gold

Digitally signed: **06/18/2025**

Filed with COE: 06/18/2025

Paul & Penny Gold

Baird Portfolio Assets as of 6/18/2025

Symbol	Security Name	Asset Classification	Quantity	Price	Value
ACCRUED I	ACCRUED INTEREST	Cash and Cash Equivalents			$ 122.35
FDIC INSUI	FDIC INSURED DEPOSIT	Cash and Cash Equivalents	118916	1	$ 118,916.00
APHFX	ARTISAN HI INC I	Fixed Income	1141.972	9.15	$ 10,449.04
APHKX	ARTISAN INTL VAL I	Equities	1873.429	51.55	$ 96,575.26
BCOIX	BAIRD COR PLS BD I	Fixed Income	3089.993	10.13	$ 31,301.63
BSBIX	BAIRD SHT TRM BD I	Fixed Income	2534.645	9.53	$ 24,155.17
BUBIX	BAIRD ULTRA SHRT BD I	Fixed Income	986.444	10.13	$ 9,992.68
CCALX	CONESTOGA SMCP I	Equities	439.075	71.8	$ 31,525.59
CLMZX	COLUMBIA MTG OPP I	Fixed Income	1277.301	8.31	$ 10,614.37
DODIX	DODGE & COX INC I	Fixed Income	10033.21	12.62	$ 126,619.15
FIQIX	FID ADVS INTL SMCP Z	Equities	956.608	35.72	$ 34,170.04
FLCOX	FID LGCP VAL IDX IPRM	Equities	94.034	18.68	$ 1,756.56
FSMDX	FID MDCP IDX IPRM	Equities	3596.383	34.3	$ 123,355.94
GIBIX	GUGG T/R BD I	Fixed Income	4049.458	23.66	$ 95,810.18
GIOIX	GUGG MACRO OPP I	Fixed Income	1035.468	24.76	$ 25,638.19
MBFIX	ALSPG COR BD I	Fixed Income	11550.45	10.98	$ 126,823.94
QISCX	FED HRM MDT SMCP COR I	Equities	1292.933	25.68	$ 33,202.52
TBSIX	T ROWE SHT TRM BD I	Fixed Income	35727.09	4.62	$ 165,059.14
TILIX	NUV LGCP GRW IDX R6	Equities	642.188	68.02	$ 43,681.63
TRLGX	T ROWE LGCP GRW I	Equities	1663.57	84.64	$ 140,804.56
TSNRX	TOUCH SANDS CAP SEL R6	Equities	1339.055	19.78	$ 26,486.51
VIISX	VIRTUS KAR INTL SMID I	Equities	652.727	22.21	$ 14,497.07
VMRXX	VNGRD CSH RSRV MM ADML	Cash and Cash Equivalents	81782.08	1	$ 81,782.08
VSCSX	VNGRD S/TRM CORP BD ADML	Fixed Income	941.943	21.49	$ 20,242.36
VSOIX	VICTORY SYCA SMCO OPP I	Equities	759.99	43.2	$ 32,831.57
VVIAX	VNGRD VAL IDX ADML	Equities	3038.876	67.39	$ 204,789.85
WCMIX	WCM FOC INTL GRW I	Equities	1865.922	26.32	$ 49,111.07
	TOTAL				$ 1,680,314.42

Information provided by sources Baird believes to be reliable but not audited by Baird. Values subject to change.