

## 2024 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/21/2025

### General Information

Name: Karen Rushing

**CONFIDENTIAL**

**PID 13605**

### AGENCY INFORMATION

| Organization    | Suborganization                | Title                  |
|-----------------|--------------------------------|------------------------|
| Sarasota County | Elected Constitutional Officer | Clerk Of Circuit Court |

### Net Worth

My Net Worth as of December 31, 2024 was \$ 10,873,081.84.

### Assets

Household goods and personal effects may be reported in a lump sum if their aggregate value exceeds \$1,000. This category includes any of the following, if not held for investment purposes: jewelry; collections of stamps, guns, and numismatic items; art objects; household equipment and furnishings; clothing; other household items; and vehicles for personal use, whether owned or leased.

The aggregate value of my household goods and personal effect is \$ 37,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

| Description of Asset   | Value of Asset   |
|------------------------|------------------|
| {REDACTED}             | \$ 558,000.00    |
| Intangible Assets      | \$ 10,994,508.23 |
| 2018 Macan SUV Vehicle | \$ 26,000.00     |
| See Attached           |                  |

**Liabilities**

LIABILITIES IN EXCESS OF \$1,000:

| Name of Creditor | Address of Creditor | Amount of Liability |
|------------------|---------------------|---------------------|
| PHH Mortgage     | PO BOX 24738        | \$ 184,426.39       |

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

| Name of Creditor | Address of Creditor | Amount of Liability |
|------------------|---------------------|---------------------|
| N/A              |                     |                     |

**Income**

Identify each separate source and amount of income which exceeded \$1,000 during the year, including secondary sources of income. Or attach a complete copy of your 2024 federal income tax return, including all W2s, schedules, and attachments. Please redact any social security or account numbers before attaching your returns, as the law requires these documents be posted to the Commission's website.

☐ I elect to file a copy of my 2024 federal income tax return and all W2s, schedules, and attachments.

PRIMARY SOURCES OF INCOME:

| Name of Source of Income Exceeding \$1,000 | Address of Source of Income                | Amount        |
|--------------------------------------------|--------------------------------------------|---------------|
| Public Salary                              | Sarasota County P.O. Box 3079 Sarasota, FL | \$ 181,836.79 |
| Social Security                            | 6401 Security Blvd. Baltimore MD 21235     | \$ 44,281.00  |

SECONDARY SOURCES OF INCOME (Major customers, clients, etc. of businesses owned by reporting person):

| Name of Business Entity | Name of Major Sources of Business' Income | Address of Source | Principal Business Activity of Source |
|-------------------------|-------------------------------------------|-------------------|---------------------------------------|
| N/A                     |                                           |                   |                                       |

**Interests in Specified Businesses****Business Entity # 1**

N/A

**Training**

This section applies only to a Constitutional or elected municipal officer, 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 Reporting Official or Candidate**

Under the penalties of perjury, I declare that I have read the foregoing Form 6 and that the facts stated in it are true.

***Karen Rushing***

Digitally signed: 06/21/2025

Filed with COE: 06/21/2025

|    | A                                               | B              | C            |
|----|-------------------------------------------------|----------------|--------------|
| 1  | 2024                                            |                |              |
| 2  | Karen E. Rushing, Sarasota Clerk & Comptroller  |                |              |
| 3  | Non IRA-Summit Brokerage Services Inc. STOCK    | Market Value   |              |
| 4  | Air Prods & Chems Inc Com                       | \$29,004.00    |              |
| 5  | Alphabet Inc Cap STK CL C                       | \$38,088.00    |              |
| 6  | Altria Group Inc MO                             | \$26,145.00    |              |
| 7  | Amazon Com Inc Com                              | \$32,908.50    |              |
| 8  | Automatic Data Processing                       | \$43,909.50    |              |
| 9  | Fastenal Co Com                                 | \$25,168.50    |              |
| 10 | Fedex Corp Com                                  | \$42,199.50    |              |
| 11 | Honeywell International                         | \$33,883.50    |              |
| 12 | Johnson & Johnson                               | \$28,924.00    |              |
| 13 | Microsoft Corp                                  | \$126,450.00   |              |
| 14 | Nextera Energy Inc                              | \$57,352.00    |              |
| 15 | Packing Corp Amer Com                           | \$45,026.00    |              |
| 16 | Qualcomm Inc Com                                | \$23,043.00    |              |
| 17 | Smith A O Corp                                  | \$34,105.00    |              |
| 18 | Suburban Propane Partners L P Unit LTD Part Int | \$25,800.00    |              |
| 19 | Valmont Inds Inc Com                            | \$23,000.25    |              |
| 20 | Verizon Communications Inc Com                  | \$35,991.00    |              |
| 21 | Corp Backed ██████████ Goldman Sachs Cap 1 DEB  | \$25,850.00    |              |
| 22 | Proshare TR S&P 500 DIV Aristocrats ETF         | \$74,662.50    |              |
| 23 | Vanguard Index FDS Vanguard Total Stk MKt ETF   | \$86,943.00    |              |
| 24 | Cash                                            | \$84,190.26    |              |
| 25 | Total Non IRA Cetera Brokerage Service          | \$942,643.51   | \$942,643.51 |
| 26 | IRA-Summit Brokerage Services Inc. Stock        | Market Value   |              |
| 27 | ABBVIE INC                                      | \$ 53,310.00   |              |
| 28 | Altria Group INC                                | 7,843.50       |              |
| 29 | Cigna Group Com                                 | 17,949.10      |              |
| 30 | JPMorgan Chase & Co                             | \$71,913.00    |              |
| 31 | Hubbell Inc Com                                 | \$41,889.00    |              |
| 32 | Lockhead Martin Corp                            | \$48,594.00    |              |
| 33 | Truist Finl Corp Com                            | \$21,690.00    |              |
| 34 | Cash                                            | \$30,032.93    |              |
| 35 | Total IRA Cetera Brokerage Service              | 293,221.53     | \$293,221.53 |
| 36 | Nationwide 457 Deferred Comp. (Mutual Fund)     | Market Value   |              |
| 37 | American Cent. HI Inc R6                        | \$177,746.11   |              |
| 38 | DE SMCap Cor Inst                               | \$179,056.82   |              |
| 39 | Fld Contra                                      | \$1,064,526.51 |              |
| 40 | Fld Puritan                                     | \$25,760.53    |              |
| 41 | Invesco Opp Gbl A                               | \$156,819.13   |              |

|    | A                                              | B                     | C               |
|----|------------------------------------------------|-----------------------|-----------------|
| 42 | NW SP 500 Indx Inst Svc                        | \$134,101.76          |                 |
| 43 | Nationwide Fixed                               | \$668,366.30          |                 |
| 44 | Tchstn Md Cap Y                                | \$157,205.61          |                 |
| 45 | <b>Total 457 Def Comp Nationwide</b>           | <b>\$2,563,582.77</b> | \$2,563,582.77  |
| 46 | <b>FRS Investment Plan</b>                     | <b>Market Value</b>   |                 |
| 47 | FRS Stable Value Fund (350)                    | \$662,184.13          |                 |
| 48 | FRS Diversified Income Fund Bond (310)         | \$1,210,569.98        |                 |
| 49 | FRS U.S. Stock (340)                           | \$5,274,421.46        |                 |
| 50 | <b>Total FRS Investment Plan</b>               | <b>\$7,147,175.57</b> | \$7,147,175.57  |
| 51 | Cash Checking Truist                           | \$45,385.87           |                 |
| 52 | Cash Saving Achieva                            | \$2,498.98            |                 |
| 53 | <b>Total Cash Checking/Savings Accounts</b>    | <b>\$47,884.85</b>    | \$47,884.85     |
| 54 | 2024                                           |                       |                 |
| 55 | Karen E. Rushing, Sarasota Clerk & Comptroller |                       | \$10,994,508.23 |