2024 Form 1 - Statement of Financial Interests

Filed with COE: 06/28/2025

General Information

Name: Carol Jean Gillespie

PID 311337

AGENCY INFORMATION

Organization	Suborganization	Title
Lake Wales	Community Redevelopment Agency Board	Commissioner
Lake Wales	Mayor And City Commission	City Commissioner

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**
Charles Schwab & Co., Inc	3000 Schwab Way, Westlake, Texas 76262	Financial Services Company
Vanguard Corporation	PO Box 3009, Monroe, WI 53566-8309	Investment Management Company
American General Life Services Co, LLC	PO Box 1834, Wilmington, DE 19899	Life Insurance Company
US Social Security Administration	6401 Security Blvd, Baltimore, MD 21233	Retirement Income Provider
State Street Retiree Services for Syntex Non-Qualified Plans and Supplemental Pmts	PO Box 5149, Boston, MA 002206-5149	Retirement Income Servicer
AVR Properties	379 South 1 Street, Livermore, CA	Rental Property Manager

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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
Stocks, bonds, mutual funds	Charles Schwab & Co., Inc.
Stocks, bonds, mutual funds	Vanguard Corporation
Checking account	Wells Fargo Bank
Checking account	JP Morgan Chase Bank

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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.

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Signature of Filer

Carol Gillespie

Digitally signed: **06/28/2025**

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