

2024 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 07/02/2025

General Information

Name: Hon Katherine Fernandez Rundle

CONFIDENTIAL

PID 9939

AGENCY INFORMATION

Organization	Suborganization	Title
State Attorney; 11Th Circuit	Elected Constitutional Officer	State Attorney
The Children's Trust	Board of Supervisors	State Attorney

Net Worth

My Net Worth as of December 31, 2024 was \$ 7,017,662.06.

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 \$ 576,323.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
See attached	\$ 6,474,827.10
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
See attached.	See attached	\$ 26,488.04
See Attached		

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
See attached.	See attached.	\$ 320,535.13
See Attached		

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.

CPA/Attorney Signature Only

If a certified public accountant licensed under Chapter 473, or attorney in good standing with the Florida Bar prepared this form for you, he or she must complete the following statement:

I, **Howard Alan Pohl CPA** prepared the CE Form 6 in accordance with Art. II, Sec. 8, Florida Constitution, Section 112.3144, Florida Statutes, and the instructions to the form. Upon my reasonable knowledge and belief, the disclosure herein is true and correct.

Howard Alan Pohl CPA

Digitally signed: 07/02/2025

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.

Katherine Fernandez Rundle

Digitally signed: 07/02/2025

Filed with COE: 07/02/2025

Attachment

FORM 6 FULL AND PUBLIC DISCLOSURE OF FINANCIAL INTERESTS**PART B—ASSETS****ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:**

DESCRIPTION OF ASSET	VALUE OF ASSET
Residence	\$2,432,811.00 (approx.)
	
Grove Bank & Trust – Checking #1	110,332.50 (approx.)
Raymond James Bank (cash)	105,498.12 (approx.)
Fla. Division of Retirement (DROP Account)	1,249,779.93 (approx.)
iShares MSCI Emerging Mkts ETF	5,953.08 (approx.)
iShares MSCI EAFE ETF	13,423.48 (approx.)
Vanguard Index S&P 500 ETF	60,346.72 (approx.)
iShares S&P Small Cap ETF	6,682.76 (approx.)
iShares Aggressive Alloc. ETF	22,446.73 (approx.)
Grove Bank & Trust – CD	16,045.05 (approx.)
iShares S&P Mid Cap ETF	11,838.90 (approx.)
Am Fd Washington Mutual Inv. Fd	6,728.37 (approx.)
Am Fd New World	3,222.96 (approx.)
Am Fd Global Sm. Cap	3,309.38 (approx.)
Am Fd Capital World Growth & Inc.	6,654.48 (approx.)
Am Fd Global Growth	3,296.00 (approx.)
Am Fd Capital World Bond	4,929.06 (approx.)
Am Fd Bond Fund of America	5,022.58 (approx.)
Deferred Comp – Nationwide – FLA Fixed (cash)	380,816.01 (approx.)
Deferred Comp – Voya Vanguard Trgt. Ret. Inc. Fd	80,678.63 (approx.)
Deferred Comp – Voya Fidelity 500 Index Fd	807,583.68 (approx.)
Deferred Comp – Voya American Fd Growth R6	471,808.49 (approx.)
Grove Bank & Trust – Money Market	2,538.98 (approx.)
Deferred Comp–Voya JP Morgan Mid-Cap Growth Fd R6	132,893.54 (approx.)
Deferred Comp – Voya American Fd New Perspect R6	211,219.34 (approx.)
iShares 7-10 Yr. Treas.Bd. ETF	9,060.10 (approx.)
iShares MSCI USA MMENTM ETF	7,242.20 (approx.)
Vanguard Mid-Cap ETF	8,188.03 (approx.)
Investment in 5thAvenue LLC	241,477.00 (approx.)
Loan to EC Ventures Corp.	53,000.00 (approx.)
Total:	<u>\$ 6,474,827.10 (approx.)</u>

PART C – LIABILITIES

LIABILITIES IN EXCESS OF \$1,000:

CREDITORS

VRIAC (Voya)

P.O. Box 990067

Hartford, CT 06199

\$26,488.04 (approx.)

Total: \$26,488.04 (approx.)

PART D- INCOME

PRIMARY SOURCES OF INCOME (WHICH EXCEEDS \$1,000):

State of Florida Salary 1350 NW 12 Avenue Miami, FL 33136	\$215,750.52 (approx.)
State of Florida Vehicle Miami-Dade County	\$14,712.33 (approx.)
Lincoln National Life P.O. Box 1110 Fort Wayne, IN 46801 (IRA)	\$2,611.15 (approx.)
Social Security Administration 1200 Rev. Abraham Woods, Jr. Blvd. Birmingham, AL 35285	\$56,181.00 (approx.)
Sale of Stock – iShares MSCI USA SMCP MN ETF (Net gain on sale \$759.66)	\$4,127.94 (approx.)
Sale of Stock – iShares US Aggregate Bond ETF (Net loss on sale \$1,821.09)	\$20,593.07 (approx.)
Sale of Stock – iShares MSCI USA minimum Vol ETF (Net gain on sale \$471.66)	\$2,072.34 (approx.)
Sale of Stock – iShares MSCI USA MMENTM ETF (Net gain on sale \$221.93)	\$1,275.77 (approx.)
Sale of Stock – Vanguard Index Fd S&P 500 ETF (Net gain on sale \$1381.05)	\$2,211.01 (approx.)
Victor M. Lopez 2000 South Bayshore Drive Unit 69 Miami, FL 33133 (Dock Rental)	\$1,000.00 (approx.)