

2024 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 12/09/2025

General Information

Name: Jon M Philipson

PID 317770

AGENCY INFORMATION

Organization	Suborganization	Title
Commission On Ethics	Governing Board	Commissioner

Net Worth

My Net Worth as of December 31, 2024 was \$ 1,084,990.56.

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 \$ 75,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
1113 CULBREATH ISLES DRIVE TAMPA, FL 33629	\$ 714,132.00
BANK ACCOUNTS BANK OF CENTRAL FL	\$ 67,908.36
BANK ACCOUNT AMEX	\$ 7,707.67
BANK ACCOUNT CHARLES SCHWAB	\$ 29,354.37

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Description of Asset	Value of Asset
CASH ACCOUNT CHARLES SCHWAB BROKERAGE	\$ 4,505.93
INVESTCO FTSE RAFI	\$ 1,945.60
INVESTCO FTSE RAFI US	\$ 5,042.50
ISHARES CORE MSCI	\$ 2,088.80
ISHARES NATIONAL MUNI	\$ 7,032.30
SCHAWB FUNDAMNTL INTRNL	\$ 3,154.95
SCHWAB FUNDAMNTL US SML	\$ 2,673.00
SCHWAB FUNDTL EMRG MKT	\$ 1,510.60
SCHWAB FUNDTL INTRNL SML	\$ 1,775.28
SCHWAB INTERNATIONAL	\$ 2,812.00
SCHWAB US SMALL CAP ETF	\$ 1,603.32
VANGUARD MUNI BND TAX	\$ 3,509.10
VANGUARD S&P 500 ETF	\$ 3,232.86
VGRD FTSE ALL WRLD EX US	\$ 1,144.80
CASH ON HAND	\$ 1,500.00
MODERATE MANAGED ACCOUNT RETIREMENT PORTFOLIO	\$ 382,378.49
CASH ACCOUNT CHARLES SCHWAB RETIREMENT	\$ 9,219.95
SCHWAB US SMALL CAP ETF RETIREMENT	\$ 7,602.84
SCHWAB 5 10 YEAR CORP RETIREMENT	\$ 3,773.97
VANGUARD MORTGAGE BACKED RETIREMENT	\$ 4,896.72
XTRACKERS INTER REAL EST RETIREMENT	\$ 1,226.98
CHARLES SCHWAB US REIT RETIREMENT	\$ 2,400.84
SCHWAB EMERGING MARKETS RETIREMENT	\$ 7,190.10
SCHWAB FUNDAMNTL INTRNL RETIREMENT	\$ 9,796.95
SCHWAB FUNDAMNTL US SML RETIREMENT	\$ 11,226.60
SCHWAB FUNDMNTL US LARGE RETIREMENT	\$ 18,115.30
SCHWAB FUNDTL EMRG MKT RETIREMENT	\$ 10,893.75
SCHWAB FUNDTL INTRNL SML RETIREMENT	\$ 4,369.92

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Description of Asset	Value of Asset
SCHWAB INTERMEDIATE TERM RETIREMENT	\$ 2,088.94
SCHWAB INTERNATIONAL RETIREMENT	\$ 9,250.00
SCHWAB INTERNATNAL SMALL RETIREMENT	\$ 4,291.25
SCHWAB US LARGE CAP ETF RETIREMENT	\$ 12,517.20
REINDEER DENTISTRY, LLC.	\$ 896,268.50

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
JP MORGAN CHASE	3415 VISION DRIVE, COLUMBUS, OH 43219	\$ 730,727.32
BANK OF CENTRAL FLORIDA	5015 SOUTH FLORIDA AVENUE, LAKE LAND, FL 33813	\$ 530,025.00

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
GUNSTER YOAKLEY & STEWART, PA	777 S. FLAGLER DRIVE, WEST PALM BEACH, FL 33401	\$ 249,323.72

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

Based on the office or position you hold, the certification of training required under Section 112.3142, F.S., is not applicable to you 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, **Michael DeMeola** 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.

Michael DeMeola

Digitally signed: 12/09/2025

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.

Jon M Philipson

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