

## 2025 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 05/25/2026

### General Information

Name: Mrs Kimberly Sullivan Amontree

PID 268019

### AGENCY INFORMATION

| Organization                    | Suborganization                | Title                     |
|---------------------------------|--------------------------------|---------------------------|
| Charlotte County Public Schools | Elected Constitutional Officer | Board Member - District 2 |

### CANDIDATE FOR

| Position          | Agency Name      | Position sought or held  |
|-------------------|------------------|--------------------------|
| County Commission | Charlotte County | Commissioner, District 4 |

### Net Worth

My Net Worth as of December 31, 2025 was \$ 4,699,329.00.

**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.

The aggregate value of my household goods and personal effect is \$ 100,000.00.

**ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:**

| Description of Asset                         | Value of Asset  |
|----------------------------------------------|-----------------|
| 1117 San Mateo Drive Punta Gorda, FL 33950   | \$ 1,768,557.00 |
| 2111 Wisconsin Ave #412 Washington D.C.      | \$ 290,000.00   |
| JKA REAL ESTATE HOLDINGS LLC (tax basis)     | \$ 74,017.00    |
| Rion Aesthetics, Inc (21,632 Shares)         | \$ 50,000.00    |
| Bank of America Checking                     | \$ 113,616.00   |
| Centennial Bank                              | \$ 96,164.00    |
| Suncoast Credit Union                        | \$ 4,273.00     |
| Fidelity Investment Account                  | \$ 924,606.00   |
| Fidelity IRA                                 | \$ 682,670.00   |
| NY 529                                       | \$ 103,499.00   |
| HSA Optum Bank                               | \$ 42,370.00    |
| LMCU                                         | \$ 50,319.00    |
| VIRGINIA 529                                 | \$ 23,268.00    |
| CHARLOTTE ENDOSCOPIC SURGERY CENTER, LLC     | \$ 250,000.00   |
| EQUITY TRUST IRA                             | \$ 282,573.00   |
| LEXUS RX 350 (2025)                          | \$ 53,000.00    |
| FLORIDA 529                                  | \$ 27,495.00    |
| 2643 WAX MYRTLE PORT CHARLOTTE FLORIDA 33953 | \$ 350,000.00   |
| CAMPAIGN LOAN TO SELF                        | \$ 25,000.00    |

**Liabilities**

LIABILITIES IN EXCESS OF \$1,000:

| Name of Creditor    | Address of Creditor                            | Amount of Liability |
|---------------------|------------------------------------------------|---------------------|
| BANK OF AMERICA     | PO BOX 31785 TAMPA FL 33631                    | \$ 423,701.00       |
| First Home Mortgage | 1 Corporate Drive STe 360 Lake Zurich,IL 60047 | \$ 188,397.00       |

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 2025 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 2025 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        |
|--------------------------------------------|-----------------------------------------------|---------------|
| Independent Spin Instructor                | 1117 San Mateo Drive Punta Gorda FL 33950     | \$ 2,714.00   |
| Charlotte County Public Schools            | 1445 Education Way Port Charlotte, FL 33948   | \$ 47,405.00  |
| JKA Real Estate Holdings, LLC              | 2400 Harbor Blvd. #9 Port Charlotte, FL 33952 | \$ 12,899.00  |
| Fidelity Dividend Income                   | PO Box 28019 Albuquerque, NM 87125            | \$ 17,014.00  |
| Charlotte Endoscopic Surgery Center, LLC   | 23970 Suncoast Blvd Port Charlotte, FL 33980  | \$ 239,531.00 |
| Lake Michigan Credit Union Interest Income | PO Box 2848 Grand Rapids, MI 49501            | \$ 5,049.00   |

## 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 |
|-------------------------|-------------------------------------------|---------------------------------------|---------------------------------------|
| JKA Real Estate         | Millennium Physician Group                | 13813 Metro Pkwy Fort Myers, FL 33912 | Medical                               |

**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.

***Kimberly Sullivan Amontree***

Digitally signed: 05/25/2026

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