

General Information

Name: Com William George Truex

PID 228990

AGENCY INFORMATION

Organization	Suborganization	Title
Charlotte County	Elected Constitutional Officer	County Commissioner, District 3

Net WorthMy Net Worth as of May 31, 2026 was \$ 2,956,802.17.**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 \$ 270,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Home located at 5 Long Meadow Place Rotonda West FL 33947	\$ 680,000.00
Truist Bank Cash on Hand	\$ 8,917.45
Capital One Bank Cash on Hand	\$ 66,325.31
50% Ownership Truex Preferred Construction	\$ 1,125,000.00

2025 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/15/2026

Description of Asset	Value of Asset
FRS U.S. Stock Market Index Fund (120)	\$ 125,504.15
FRS Global Stock	\$ 48,538.51
FRS U.S. Stock Fund (340)	\$ 74,201.59
Fidelity Traditional IRA	\$ 9,882.00
Fidelity Roth IRA	\$ 32,843.52
AQR Diversifying Strategies Fund CL I	\$ 20,723.61
AQR ALT RISK PREMIA CLASS I (QRPX)	\$ 6,891.02
CALAMOS AKSIA ALTERN CREDIT AND INC I	\$ 8,467.54
CAZ STRATEGIC OPPORTUNITITES CL I (CZSIX)	\$ 6,086.59
PERMANENT PORTFOLIO (PRPFX)	\$ 6,389.13
FIDELITY GOVERNMENT CASH RESERVES (FDRXX)	\$ 9,792.03
ROYAL CARRIBEAN GROUP COM USD0.01 (RCL)	\$ 3,483.01
ABRDN PRECIOUS METALS BASKET E PHYSCL PRECS MET (GLTR)	\$ 3,855.60
AIR PRODUCTS AND CHEMICALS INC (APD)	\$ 1,671.72
EA SERIES TRUST MILI LONG SH STF (ORR)	\$ 4,090.32
ALOHABET INC CAP STK CL C (GOOG)	\$ 4,165.57
AMAZON.COM INC (AMZN)	\$ 3,518.32
AMGEN INC (AMGN)	\$ 7,579.12
AMPHENOL CORP CLAASS A COM USD0.001 (APH)	\$ 11,373.74
APPLE INC (AAPL)	\$ 10,527.65
APPLIED MATERIALS INC COM USD0.01 (AMAT)	\$ 6,300.84
ARISTA NETWORKS INC COM SHS (ANET)	\$ 3,986.75
BAKER HUGHES COMPANY CL A (BKR)	\$ 7,304.55
BERSHIRE HATHAWAY INC COM USD0.0033 CLASS B (BRKB)	\$ 2,372.40
BLACKROCK INC COM (BLK)	\$ 6,803.67
BROADCOM INC COM (AVGO)	\$ 12,287.06
CBOE GLOBAL MARKETS INC (CBOE)	\$ 2,001.36
CME GROUP INC COM (CME)	\$ 4,767.25

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Description of Asset	Value of Asset
CARRIER GLOBAL CORPORATION COM (CARR)	\$ 2,363.19
CHEVRON CORP NEW COM (CVX)	\$ 6,437.18
CLOUDFARE INC CL A COM (NET)	\$ 2,660.02
COCA-COLA CO (KO)	\$ 8,913.19
COSTCO WHOLESALE CORP COM (COST)	\$ 7,236.47
CUMMINS INC (CMI)	\$ 1,939.89
EQT VORP COM (EQT)	\$ 2,368.36
ECOLAB INC (ECL)	\$ 5,632.00
META PLLATFORMS INC CLASS A COMMON STOCK (META)	\$ 2,530.04
FEDEX CORP COM USD0.10 (FDX)	\$ 4,941.00
FIRST TR EXCHANGE-TRADED FD III FIRST TR LONG/SHORT EQUITY (FTLS)	\$ 6,279.85
GE AEROSPACE COM NEW (GE)	\$ 5,512.98
GILEAD SCIENCES INC COM USD0.001 (GILD)	\$ 4,436.19
GOLDMAN SACHS GROUP INC COM USD0.01 (GS)	\$ 6,153.36
HCA HEALTHCARE INJC COM (HCA)	\$ 78,108.70
HARBOR EFT TRUST HARBOR COMMODITY (HGER)	\$ 14,110.56
HOWMET AEROSPACE INC COM (HWM)	\$ 3,102.09
INTERACTIVE BROKERS GROUP INC COM CL A (BKR)	\$ 9,311.96
INTUITIVE SURGICAL INC (ISRG)	\$ 2,547.84
JPMORGAN CHASE&CO. COM (JPM)	\$ 8,357.63
JOHNSON & JOHNSON COM (JNJ)	\$ 7,022.86
KLA CORP COM NEW (KLAC)	\$ 3,864.55
L3HARRIS TECHNOLOGIES INC COM (LHX)	\$ 1,897.69
ELI LILLY & CO COM (LLY)	\$ 11,182.60
LOCKHEAD MARTIN CORP COM USD1.PP (LMT)	\$ 5,820.62
MASTERCARD INCORPORATED CL A (MA)	\$ 2,000.12
MICROSOFT CORP (MSFT)	\$ 11,130.38
MICRON TECHNOLOGY INC (MU)	\$ 3,884.00

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Description of Asset	Value of Asset
NETFLIX INC (NFLX)	\$ 2,580.60
NVIDIA CORPORATION COM (NVDA)	\$ 10,349.02
OREILLY AUTOMOTIVE INC COM (ORLY)	\$ 2,606.40
OCCIDENTAL PETE CORP COM (OXY)	\$ 2,548.35
PALO ALTO NETWORKS INC COM USD0.0001 (PANW)	\$ 5,070.42
PARKER-HANNIFIN CORP COM (PH)	\$ 7,790.02
PHILIP MORRIS INTERNATIONAL INC COM NPV (PM)	\$ 2,825.30
ROSS STORES INC (ROST)	\$ 4,634.60
SERVICENOWINC COM USD0.001 (NOW)	\$ 3,233.62
STRYKER CORPORATION COM (SYK)	\$ 5,097.13
TJX COMPANIES INC (TJX)	\$ 6,986.34
TERADYNE INC COM USD0.125 (TER)	\$ 2,621.20
TRUST FOR PROFESSIONAL MANAGERS CONVERGENCE LONG/SHORT EQUITY ETF (CLSE)	\$ 7,334.60
INION PAC CORP COM (UNP)	\$ 6,484.31
UNITED RENTALS INC (URI)	\$ 7,103.10
VISA INC (V)	\$ 4,812.17
VISTRA CORP COM (VST)	\$ 2,422.83
WALMART INC COM (WMT)	\$ 4,346.99
VENTAS INC (VTR)	\$ 2,123.50
WELLTOWER INC COM (WELL)	\$ 7,986.72
Fidelity Roth IRA	\$ 15,158.68
50% Ownership in Truex Holdings, LLC Investments	\$ 279,808.00

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Freedom Mortgage	P.O. BOX 619063 DALLAS, TX 75261-9063	\$ 142,347.44
US Small Business Administration	299 E Broward Blvd, Ft. LAuderdale FL33301	\$ 52,242.49
Citi	BOX 6500 SIOUX FALLS, SD 57117	\$ 17,518.47
Truist Auto Loan	PO Box 580048 Charlotte NC 28258-0048	\$ 49,596.72

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

Name of Creditor	Address of Creditor	Amount of Liability
Truist	PO Box 580050 Charlotte NC 28258-0048	\$ 590,384.31

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
Truex Preferred Construction, LLC	3797 S. Access Rd. Englewood FL 34224	\$ 104,000.00
Charlotte County Board of County Commissioners	18500 Murdock Circle Port Charlotte FL 33948	\$ 94,272.00

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.

William George Truex

Digitally signed: 06/15/2026

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