

2025 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 08/13/2026

General Information

Name: Mr TONY J SMITH

PID 323025

AGENCY INFORMATION

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

Net Worth

My Net Worth as of December 31, 2025 was \$ 993,720.00.

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 \$ 72,350.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Real Estate Interests - See Statement 1	\$ 1,284,000.00
Cash- See Statement 1	\$ 30,350.00
Individual Investment Accounts- See Statement 1	\$ 23,303.00
Individual Retirement Accounts- See Statement 1	\$ 174,865.00
529 Education Plans- See Statement 1	\$ 33,099.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
CrossCreek Mortgage - See Statement 1	100 S Orange Ave #500, Orlando, FL 32801	\$ 624,247.00
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 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
See Statement 2	See Statement 2	\$ 380,864.00
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
Ashley, Brown & Smith, CPA's, P.A.	N/A	N/a	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.

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.

TONY J SMITH

Digitally signed: 08/13/2026

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STATEMENT 1

Tony Smith

Addendum to Full and Public Disclosure of Financial Interests

FORM 6 - 2025

Assets Individually Valued at Over \$1,000 (December 31, 2025)

			<u>Amount</u>
Cash:			
	Suncoast Credit Union - Checking - Punta Gorda, FL	\$ 25,350	
	Crews Bank & Trust - CD - Punta Gorda, FL	<u>5,000</u>	
			\$ 30,350
Real Estate Interests:			
	29221 Clark Dr, Punta Gorda, FL 33982	\$ 749,000	
	9992 Spring Gulch Ln, Punta Gorda, FL 33950	285,000	
	9110 Austrian Blvd, Punta Gorda, FL 33982	<u>250,000</u>	
			1,284,000
Individual Investment Accounts			
	First FED BK Lake City CD	<u>23,303</u>	
			23,303
Individual Retirement Accounts			
Type	Asset	Ticker	Value
ROTH	FDIC INSURED DEPOSIT Cash	QHUNQ	35,085
ROTH	JP Morgan	JEPI	3,766
ROTH	JP Morgan	JEPQ	8,117
ROTH	Berkshire Hathaway	BRKB	7,037
ROTH	Energy Transfer LP	ET	3,144
ROTH	T-mobile	TMUS	5,143
SIMPLE	Fidelity Government Money Market	SPAXX	15,412
SIMPLE	JP Morgan	JEPI	4,082
SIMPLE	JP Morgan	JEPQ	10,194
SIMPLE	Northpointe BK Grand Rapids CD	n/a	50,009
SIMPLE	Royal Caribbean Group	RCL	10,675
SIMPLE	AT&T	TMUS	6,787
SIMPLE	Amazon	AMZN	3,462
SIMPLE	Berkshire Hathaway	BRKB	6,032
SIMPLE	Energy Transfer LP	ET	2,641
SIMPLE	Occidental Pete Corp	OXY	1,028
SIMPLE	Wells Fargo	WFC	<u>2,251</u>
			174,865
Education Investment Accounts - 529			
	529 529 Education Accounts	N/A	<u>33,099</u>
			33,099
Total - Assets Individually Valued at Over \$1,000 (December 31, 2025)			<u><u>\$ 1,545,617</u></u>

STATEMENT 1 - Continued

Tony Smith

Addendum to Full and Public Disclosure of Financial Interests

FORM 6 - 2025

Liabilities in Excess of \$1,000 (December 31, 2025)

<u>Name of Creditor / Address of Creditor</u>	<u>Amount</u>
CrossCountry Mortgage, LLC / 100 S Orange Ave #500, Orlando, FL 32801	\$ 624,247
Total - Liabilities in Excess of \$1,000 (December 31, 2025)	<u><u>\$ 624,247</u></u>

STATEMENT 2

Tony Smith

Addendum to Full and Public Disclosure of Financial Interests

FORM 6 - 2025

Primary Sources of Income Exceeding \$1,000 (December 31, 2025)

<u>Name of Source / Address of Source</u>	<u>Amount</u>
Ashley, Brown & Smith, CPA's, P.A. / 366 E. Olympia Ave, Punta Gorda, FL 33950	\$ 380,864
Total - Primary Sources of Income Exceeding \$1,000 (December 31, 2025)	<u><u>\$ 380,864</u></u>