

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/22/2023

General Information

Name: Hon Bonnie Jean Helms

CONFIDENTIAL

Address: 302 Fleming Street Freeman Justice Center, Key West, FL 33040

PID 257338

County: Monroe

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (16Th)	Elected Constitutional Officer	Circuit Judge

Net Worth

My Net Worth as of December 31, 2022 was \$ 759,668.00.

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, whether owned or leased.

The aggregate value of my household goods and personal effect is \$ 30,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
{REDACTED}Residence-Address Exempt	\$ 1,200,000.00
Wells Fargo Bank Checking and Savings Accounts	\$ 10,349.00
Florida Deferred Compensation-Nationwide-See Attached	\$ 63,942.00
UBS IRA accounts-See Attached	\$ 39,200.00
Schwab Brokerage Account-See Attached	\$ 8,889.00
2018 Kia Sportage	\$ 15,000.00
Northwestern Mutual Life Insurance Cash Value	\$ 25,335.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Flagstar Bank	515 Corporate Drive, Troy, Michigan 48098-2639	\$ 474,832.00
Discover Home Loans	1 Corporate Drive, Suite 360, Lake Zurich, IL 60047-8945California	\$ 98,880.00
USAA	9800 Fredericksburg Rd, San Antonio, Texas 78288	\$ 9,335.00

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.

☐ I elect to file a copy of my 2022 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
State of Florida	200 E. Gaines St., Tallahassee, FL 32399	\$ 169,369.00

SECONDARY SOURCES OF INCOME (Major customers, clients, etc. of businesses owned by reporting person):

Business Entity	Major Sources of Business Income	Address	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.

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.

Bonnie Jean Helms

Digitally signed: 06/22/2023

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UBS IRA assets over \$1,000-

VANGUARD GROWTH ETF	2,557
VANGUARD MID-CAP ETF	1,834
VANGUARD RUSSELL 1000 VALUE	1,331
ISHARES 20+ YEAR TREASURY BOND ETF	1,393
ISHARES BROAD USD INVT GRADE CORPORATE BOND ETF	6,973
ISHARES JP MORGAN USD EMERGING MARKEST BOND ETF	1,522
ISHARES BROAD USD HIGH YIELD BOND ETF	1,484
VANGUARD INTER TERM TREAS ETF	3,391
VANGUARD SHORT-TERM TREAS ETF	2,081

SCHWAB Deferred Comp. assets over \$1,000

VANGUARD TOTAL INTERNATIONAL STOCK E	3,879
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Nationwide Deferred Compensation

Salary Reduction

Investment option	Previous quarter balance	Contributions/ Transfers In	Exchanges	Dividends*	Investment gain/loss & Interest [§]	Fees/ Charges	Withdrawals/ Transfers Out	Units/ Shares	Current quarter balance
Specialty									
Vngrd RealEst Indx Inst [§]								1	\$2,484.47
Small cap									
SmCap Val Eq D [§]								3	\$1,209.08
Wasatch SmCap Gr Inst [§]								3	\$1,193.70
International									
AmFds New Wld R6 [§]								2	\$3,856.21
TRowePr Ovrseas Stk I [§]								8	\$7,109.80
Vngrd Ttl IntlStkIndx Inst [§]								6	\$5,202.60
Mid cap									
JPM MdCap Val R6 [§]								32	\$1,888.08
TRowePr US MdCap Gr Eq D [§]								31	\$1,880.01
Large cap									
Fid Contra K6 [§]								56	\$2,493.46
NeuBer Sustnbl Eq R6 [§]								32	\$4,444.39
TRowePr Eq Inc D [§]								39	\$6,412.53
TRowePr Gr Stk A [§]								39	\$3,606.76
Vngrd Inst Indx Inst Pls [§]								14	\$2,490.75
Bonds									
AmFds Emrg Mkt Bd R6 [§]								01	\$2,700.98
Bd Tr I T5 [§]								09	\$3,268.28
DodgeCox Inc I [§]								51	\$4,594.35
TRowePr Spctrm Inc I [§]								35	\$3,269.48
Short term									
Fixed Assets								1A	\$5,837.24
Total									\$63,942.17

* May consist of dividends, fund reinvestments and/or

§ Gain/loss is the difference between the account balance on the first and last day of the period, after allowing for the effects of transactions