

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 04/20/2023

General Information

Name: Dr Peggy Jones
Address: 1565 56th Court, Vero Beach, FL 32966 **PID 225881**
County: Indian River

AGENCY INFORMATION

Organization	Suborganization	Title
School District Of Indian River County	Elected Constitutional Officer	School Board Member, District 3

Net Worth

My Net Worth as of January 1, 2023 was \$ 1,143,122.19.

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 \$ 67,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Personal residence	\$ 440,218.00
MidFlorida checking	\$ 5,608.65
MidFlorida savings	\$ 16,231.96
Bank of America, checking	\$ 1,001.00
Bank of America, savings	\$ 83,000.00
Morgan Stanley, stock	\$ 171,349.00
Valic Financial, IRA Rollover	\$ 113,930.41
IRA	\$ 177,243.30
Roth IRA	\$ 42,680.80
Joint account	\$ 1,767.40
Life insurance (State Farm)	\$ 23,091.67
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
N/A		

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.

PRIMARY SOURCES OF INCOME:

Name of Source of Income Exceeding \$1,000	Address of Source of Income	Amount
Social Security	Social Security Administration	\$ 29,833.20
Florida Retirement System	P.O. Box 9000, Tallahassee, FL 32315-9000	\$ 86,257.02
Indian River County School District	6500 57th Street, Vero Beach, FL 32967	\$ 38,928.23

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

- ☒ 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.

Peggy Jones

Digitally signed: 04/20/2023

Filed with COE: 04/20/2023

DR. PEGGY JONES 225881

ETHICS FILING

1565 56th Court, Vero Beach, FL

Value as of Jan. 1, 2023

PART A – NET WORTH _____ \$ 1,143,122.19

Total value of all assets, as of Jan. 1, 2023

PART B – ASSETS

<u>Description</u>	<u>value</u>
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Household good and personal effects exceeding \$1,000

- | | |
|--|---------------|
| ■ Personal jewelry..... | \$2,000 |
| ■ Household furniture..... | 15,000 |
| ■ China/crystal/silver..... | 3,000 |
| ■ Misc. household..... | 10,000 |
| ■ 2018 Subaru Outback..... | 26,000 |
| ■ 2010 Toyota Rav 4 jointly owned..... | <u>11,000</u> |

TOTAL \$67,000

Personal residence _____ TOTAL \$440,218

1565 56th Court, Vero Beach, FL 32966

Checking/savings accounts

- | | |
|---|------------------|
| ■ MidFlorida Credit Union, checking, joint..... | \$5,608.65 |
| ■ MidFlorida Credit Union, savings, joint..... | 16,231.96 |
| ■ Bank of America, checking, single (Peggy).... | 1,001.00 |
| ■ Bank of America, savings, single (Peggy).... | <u>83,000.00</u> |

TOTAL \$105,841.61

Stocks/IRA/Investments

- | | |
|--|------------|
| ■ Morgan Stanley, joint stock account..... | \$171,349 |
| ■ Valic Financial, single (Peggy) | |
| IRA (rollover)..... | 113,930.41 |
| IRA..... | 177,243.30 |
| Roth IRA..... | 42,680.80 |

Joint Account balance.....\$1,767.40

TOTAL \$506,970.91

Life insurance.....TOTAL \$23,091.67

State Farm, current cash value

PART C - LIABILITIES

NONE (N/A)

PART D – INCOME

■ Social Security..... \$29,833.20

■ Florida Retirement System..... 86,257.02

■ Indian River County School District...38,928.23

TOTAL \$155,018.45

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