

## 2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/19/2023

### General Information

Name: Com William George Truex

Address: 18500 Murdock Cir # 536, Pt Charlotte, FL 33948

PID 228990

County: Charlotte

### AGENCY INFORMATION

| Organization                               | Suborganization                | Title                              |
|--------------------------------------------|--------------------------------|------------------------------------|
| Charlotte County                           | Elected Constitutional Officer | County Commissioner,<br>District 3 |
| Peace River/Manasota Reg. Water Sup. Auth. | Board of Commissioners         | County Commissioner                |

### Net Worth

My Net Worth as of March 31, 2023 was \$ 2,273,525.91.

**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 \$ 135,000.00.

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

| Description of Asset                                      | Value of Asset  |
|-----------------------------------------------------------|-----------------|
| Home located at 5 Long Meadow Place Rotonda West FL 33947 | \$ 675,000.00   |
| Cash on hand                                              | \$ 99,989.16    |
| 50% Ownership Truex Preferred Construction                | \$ 1,250,000.00 |
| Fidelity Investments                                      | \$ 228,808.19   |
| Ford Bronco                                               | \$ 80,000.00    |
| Florida Retirement System                                 | \$ 105,442.37   |
| 50% Ownership in Dolla 2 Eighty dba Bi-Rite Aluminum      | \$ 75,000.00    |

**Liabilities**

LIABILITIES IN EXCESS OF \$1,000:

| Name of Creditor         | Address of Creditor                                                                                    | Amount of Liability |
|--------------------------|--------------------------------------------------------------------------------------------------------|---------------------|
| SBA Hurricane Ian        | US Small Business Administration RE: DLH 4659319101 2 North 20th Street, Suite 320 Birmingham AL 35203 | \$ 98,400.00        |
| Freedom Mortgage Company | 907 Pleasant Valley Avenue, Suite 3 Mount Laurel NJ 08054                                              | \$ 219,419.00       |
| Barclays                 | Barclays PO BOX 13337 PHILADELPHIA PA 19101-3337                                                       | \$ 14,458.46        |
| Chase                    | PO Box 1423, Charlotte NC 28201-1423                                                                   | \$ 14,739.70        |
| Chase                    | PO Box 1423, Charlotte NC 28201-1423                                                                   | \$ 8,732.12         |
| Citi                     | PO Box 9001037, Louisville KY 40290-1037                                                               | \$ 19,964.53        |
| 5/3rd Bank               | P.O Box                                                                                                | \$ 54,000.00        |

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

| Name of Creditor  | Address of Creditor                     | Amount of Liability |
|-------------------|-----------------------------------------|---------------------|
| Truist Commercial | PO Box 5850050, Charlotte NC 28258-0050 | \$ 103,889.89       |

**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       |
|------------------------------------------------|----------------------------------------------|--------------|
| Truex Preferred Construction, LLC              | 3797 S. Access Rd. Englewood FL 34224        | \$ 96,000.00 |
| Charlotte County Board of County Commissioners | 18500 Murdock Circle Port Charlotte FL 33948 | \$ 76,563.92 |

## 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.

***William George Truex***

Digitally signed: 06/19/2023

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