

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 04/27/2023

General Information

Name: Karen Perez
Address: 901 E Kennedy Blvd, Tampa, FL 33602 **PID 275072**
County: Hillsborough

AGENCY INFORMATION

Organization	Suborganization	Title
School District Of Hillsborough County	Elected Constitutional Officer	
School District Of Hillsborough County	Elected Constitutional Officer	School Board, District 6

Net Worth

My Net Worth as of December 31, 2022 was \$ 127,355.00.

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 \$ 33,790.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
FRS	\$ 25,145.76
FIDELITY	\$ 53,883.21
TSP	\$ 138,068.34
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
AMERICAN HONDA	P.O BOX 168128, IRVING TX 75016	\$ 46,724.00
FIFTH THIRD BANK	5050 KINGSLEY DR, CINCINNATI, OH 45263	\$ 48,515.00
DEPT OF ED/NELNET	P.O. BOX 82561, LINCOLN, NE 68501	\$ 74,402.00
DEPT OF ED/NELNET	P.O. BOX 82561, LINCOLN, NE 68501	\$ 117,031.00
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.

PRIMARY SOURCES OF INCOME:

Name of Source of Income Exceeding \$1,000	Address of Source of Income	Amount
JAMES A HALEY VA	30000 BRUCE B DOWNS BLVD, TAMPA, FL 33612	\$ 96,636.00
HILLSBOROUGH COUNTY SCHOOLS	901 E KENNEDY BLVD, TAMPA, FL 33607	\$ 48,780.00
EMBRACING CHANGES CENTER FOR WELLNESS, LLC	4830 W. KENNEDY BLVD, SUITE 634, TAMPA, FL 33607	\$ 127,355.00

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

- ☒ 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.

Karen Perez

Digitally signed: **04/27/2023**

Filed with COE: **04/27/2023**

a. Employee's Social Security Number *****6915		OMB No. 1545-0008					
b. Employer's Identification Number (EIN) 31-1575142		d. Control number		1 Wages, Tips, and other compensation 69576.66	2 Federal Income Tax withheld 9983.82		
c. Employer's Name, Address, and ZIP Code DEFENSE FINANCE & ACTG SERV AGENT FOR VETERANS AFFAIRS 1240 E 9TH ST RM 1907 (ZPV) CLEVELAND OH 44199				3 Social Security Wages 88732.00	4 Social Security Tax withheld 5501.38		
				5 Medicare Wages and Tips 88732.00	6 Medicare Tax withheld 1286.61		
				7 Social Security tips	8 Allocated Tips		
e/f. Employee's Name, Address, and ZIP Code KAREN PEREZ 6002 PALM SHADOW WAY APT 1237 TAMPA FL 33647-2680				9	10 Dependent Care Benefits		
				12 See instructions for box 12 DD 9673.28 D 19155.34		14 See instructions for box 14 K 663.40 V 3310.20	
				13 ☐ Statutory Employee ☒ Retirement Plan ☐ Third-party sick pay			
15 State	Employer's State ID Number	16 State Wages, Tips, etc	17 State Income Tax	18 Local wages, tips, etc	19 Local Income Tax	20 Locality name	
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Form **W-2** Wage and Tax Statement **2022**

Department of the Treasury - Internal Revenue Service
Copy B To Be Filed With Employee's FEDERAL Tax Return
This information is being furnished to the Internal Revenue Service

a. Employee's Social Security Number *****6915		OMB No. 1545-0008 This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.					
b. Employer's Identification Number (EIN) 31-1575142		d. Control Number		1 Wages, Tips, other compensation 69576.66	2 Federal Income Tax withheld 9983.82		
c. Employer's Name, Address, and ZIP Code DEFENSE FINANCE & ACTG SERV AGENT FOR VETERANS AFFAIRS 1240 E 9TH ST RM 1907 (ZPV) CLEVELAND OH 44199				3 Social Security Wages 88732.00	4 Social Security Tax withheld 5501.38		
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Form **W-2** Wage and Tax Statement **2022**

Department of the Treasury - Internal Revenue Service
Copy C For EMPLOYEE'S RECORDS (See Notice to Employee on Back of Copy B)

a. Employee's Social Security Number *****6915		OMB No. 1545-0008				
b. Employer's Identification Number (EIN) 31-1575142		d. Control number		1 Wages, Tips, and other compensation 69576.66	2 Federal Income Tax withheld 9983.82	
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Form **W-2** Wage and Tax Statement **2022**

Department of the Treasury - Internal Revenue Service
Copy 2 To Be Filed With Employee's State, City, or Local Income Tax Return

a. Employee's Social Security Number *****6915		OMB No. 1545-0008				
b. Employer's Identification Number (EIN) 31-1575142		d. Control Number		1 Wages, Tips, other compensation 69576.66	2 Federal Income Tax withheld 9983.82	
c. Employer's Name, Address, and ZIP Code DEFENSE FINANCE & ACTG SERV AGENT FOR VETERANS AFFAIRS 1240 E 9TH ST RM 1907 (ZPV) CLEVELAND OH 44199				3 Social Security Wages 88732.00	4 Social Security Tax withheld 5501.38	
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Form **W-2** Wage and Tax Statement **2022**

Department of the Treasury - Internal Revenue Service
Copy 2 To Be Filed With Employee's State, City, or Local Income Tax Return

Notice to Employee

Do you have to file? Refer to the Form 1040 instructions to determine if you are required to file a tax return. Even if you do not have to file a tax return, you may be eligible for a refund if box 2 shows an amount or if you are eligible for any credit.

Earned income credit (EIC). You may be able to take the EIC for **2022** if your adjusted gross income (AGI) is less than a certain amount. The amount of the credit is based on income and family size. Workers without children could qualify for a smaller credit. You and any qualifying children must have valid social security numbers (SSNs). You cannot take the EIC if your investment income is more than the specified amount for **2022** or if income is earned for services provided while you were an inmate at a penal institution. For **2022** income limits and more information, visit www.irs.gov/eitc. Also see Pub. 596, Earned Income Credit. **Any EIC that is more than your tax liability is refunded to you, but only if you file a tax return.**

Employee's Social Security Number (SSN). For your protection, this form may only show the last four digits of your SSN. However, your employers have reported your complete SSN to the IRS and Social Security Administration (SSA).

Corrections. If your name, SSN, or address is incorrect, correct Copies B, C, and 2 and ask your employer to correct your employment record. Be sure to ask the employer to file Form W-2c, Corrected Wage and Tax Statement, with the SSA to correct any name, SSN, or money amount error reported to the SSA on Form W-2. Be sure to get your copies of Form W-2c from your employer for all corrections made so you may file them with your tax return. If your name and SSN are correct but are not the same as shown on your social security card, you should ask for a new card that displays your correct name at any SSA office or by calling 1-800-772-1213. You also may visit the SSA at www.SSA.gov.

Cost of employer-sponsored health coverage (if such cost is provided by the employer). The reporting in box 12, using code DD, of the cost of employer-sponsored health coverage is for your information only. **The amount reported with code DD is not taxable.**

Credit for excess taxes. If you had more than one employer in **2022** and more than \$9,114 in social security and/or Tier 1 railroad retirement (RRTA) taxes were withheld, you may be able to claim a credit for the excess against your federal income tax. See the Form 1040 instructions. If you had more than one railroad employer and more than \$5,350.80 in Tier 2 RRTA tax was withheld, you also may be able to claim a refund on Form 843. See the instructions for Form 843.

(Also see *Instructions for Employee* on the back of Copy C.)

Instructions for Employee (Also see *Notice to Employee* on the back of Copy B.)

Box 1. Enter this amount on the wages line of your tax return.

Box 2. Enter this amount on the federal income tax withheld line of your tax return.

Box 5. You may be required to report this amount on Form 8959, Additional Medicare Tax. See the Form 1040 instructions to determine if you are required to complete Form 8959.

Box 6. This amount includes the 1.45% Medicare Tax withheld on all Medicare wages and tips shown in box 5, as well as the 0.9% Additional Medicare Tax on any of those Medicare wages and tips above \$200,000.

Box 8. This amount is **not** included in boxes 1, 3, 5, or 7. For information on how to report tips on your tax return, see the Form 1040 instructions. You must file Form 4137, Social Security and Medicare Tax on Unreported Tip Income, with your income tax return to report at least the allocated tip amount unless you can prove with adequate records that you received a smaller amount. If you have records that show the actual amount of tips you received, report that amount even if it is more or less than the allocated tips. Use Form 4137 to figure the social security and Medicare tax owed on tips you didn't report to your employer. By filing Form 4137, your social security tips will be credited to your social security record (used to figure your benefits).

Box 10. This amount includes the total dependent care benefits that your employer paid to you or incurred on your behalf (including amounts from a section 125 (cafeteria) plan). Any amount over your employer's plan limit is also included in box 1. See Form 2441.

Box 12. The following list explains the codes shown in box 12. You may need this information to complete your tax return. Elective deferrals (codes D, E, F and S) and designated Roth contributions (codes AA, BB and EE) under all plans are generally limited to a total of \$20,500 (\$14,000 if you only have SIMPLE plans, \$23,500 for section 403(b) plans, if you qualify for the 15-year rule explained in Pub. 571). However, if you were at least age 50 in **2022**, your employer may have allowed an additional deferral of up to \$6,500 (\$3,000 for section 401(k)(11) and 408(p) SIMPLE plans). This additional deferral amount is not subject to the overall limit on elective deferrals. Contact your plan administrator for more information. Amounts in excess of the overall elective deferral limit must be included in income. See the Form 1040 instructions.

Note: If a year follows code D through H, S, Y, AA, BB or EE, you made a make-up pension contribution for a prior year(s) when you were in military service. To figure whether you made excess deferrals, consider these amounts for the year shown, not the current year. If no year is shown, the contributions are for the current year. Your employer does not use codes G, H, K, V, Y, Z, FF, GG, HH.

A - Uncollected social security or RRTA tax on tips. Include this tax on Form 1040 or 1040-SR. See the Form 1040 instructions.

B - Uncollected Medicare tax on tips. Include this tax on Form 1040 or 1040-SR. See the Form 1040 instructions.

C - Taxable cost of group-term life insurance over \$50,000 (included in boxes 1, 3 (up to social security wage base), and 5).

D - Elective deferrals to a section 401(k) cash or deferred arrangement. Also includes deferrals under a SIMPLE retirement account that is part of a section 401(k) arrangement.

E - Elective deferrals under a section 403(b) salary reduction agreement.

F - Elective deferrals under a section 408(k)(6) salary reduction SEP.

J - Nontaxable sick pay (information only, not included in boxes 1, 3, or 5).

L - Substantiated employee business expense reimbursements (nontaxable).

M - Uncollected Social Security or RRTA tax on taxable cost of group-term life insurance over \$50,000 (former employees only). See the Form 1040 instructions.

N - Uncollected Medicare tax on taxable cost of group-term life insurance over \$50,000 (former employees only). See the Form 1040 instructions.

P - Excludable moving expense reimbursements paid directly to member of Armed Forces (not included in boxes 1, 3, or 5).

Q - Nontaxable combat pay. See the Form 1040 instructions for details on reporting this amount.

R - Employer contributions to your Archer MSA. Report on Form 8853, Archer MSAs and Long-Term Care Insurance Contracts.

S - Employee salary reduction contributions under a section 408(p) SIMPLE plan (not included in box 1).

T - Adoption benefits (not included in box 1). Complete Form 8839, Qualified Adoption Expenses, to compute any taxable and nontaxable amounts.

W - Employer contributions (including amounts the employee elected to contribute using a section 125 (cafeteria) plan) to your health savings account. Report on Form 8889, Health Savings Accounts (HSAs).

AA - Designated Roth contributions under a section 401(k) plan.

BB - Designated Roth contributions under a section 403(b) plan.

DD - Cost of employer-sponsored health coverage. **The amount reported with Code DD is not taxable.**

EE - Designated Roth contributions under a governmental section 457(b) plan. This amount does not apply to contributions under a tax-exempt organization section 457(b) plan.

Box 13. If the "Retirement plan" box is checked, special limits may apply to the amount of traditional IRA contributions you may deduct. See Pub. 590-A, Contributions to Individual Retirement Arrangements (IRAs).

Box 14. Any amount in box 14 should be coded. The following explains the codes.

C - Taxable reimb for Permanent Change of Station (Incl in Box 1)

E - Military TSP Contribution (Tax Exempt)

F - TIAA/CREF and Fidelity Retirement Contributions

G - Pre-Tax Transportation Equity Act Benefits

H - Home to Work Transportation Fringe Benefits. (Incl in Box 1)

K - Pretax Vision and Dental Deduction

P - Parking Fringe Benefits/Employer Provided Vehicle. (Incl in Box 1)

R - Retirement Deductions. (for Civilian Employees who have wages earned in Puerto Rico)

S - Federal Employee Health Benefit employee deduction for Civilian Employees who have wages earned in Puerto Rico.

STT - Oregon Transit Tax

T - Cost of Living Allowance not included in box 1 or 16 for Civilian Employees who have COLA included for wages in Alaska, Hawaii, Guam and the Northern Mariana Islands, Puerto Rico and the U.S. Virgin Islands

U - Non-Cash Fringe Benefits (Incl in Box 1)

V - Pretax FEHB Incentive

X - Occupational Tax/Local Services Tax (CIVILIAN)

Y - Pretax Flexible Spending Accounts (CIVILIAN) Employee Contributions

Z - Retirement Deductions for Massachusetts Residents Only

DX - Sick Leave Wages \$511/day limit

DY - Sick Leave Wages \$200/day limit

DZ - Emergency Family Leave Wages

Note: Keep Copy C of Form W-2 for at least 3 years after the due date for filing your income tax return. However, to help **protect your social security benefits**, keep Copy C until you begin receiving social security benefits, just in case there is a question about your work record and/or earnings in a particular year.