

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 05/06/2023

General Information

Name: Hon Robert R. Wheeler

CONFIDENTIAL

Address: 301 S MONROE ST RM 365K LEON COUNTY COURTHOUSE, TALLAHASSEE, FL 32301

PID 36352

County: Leon

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (2Nd)	Elected Constitutional Officer	Circuit Judge

Net Worth

My Net Worth as of December 31, 2022 was \$ 2,300,000.00.

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 \$ 100,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
{REDACTED}Residence	\$ 350,000.00
Georgia Farm	\$ 140,000.00
Merrill Lynch Joint CMA Reserve Account - Cash	\$ 17,208.71

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Description of Asset	Value of Asset
Stock - Automatic Data Processing	\$ 52,549.20
Stock - CVS Health Corp	\$ 19,569.90
Stock - Johnson and Johnson Com	\$ 70,660.00
Stock - Abbott Labs	\$ 10,979.00
Stock - Alphabet Inc CL A	\$ 12,352.20
Stock - Amazon Inc	\$ 8,400.00
Stock - Dover Corp	\$ 13,541.00
Stock - General Dynamics	\$ 12,405.50
Stock - JP Morgan Chase	\$ 6,705.00
Stock - Novartis	\$ 9,072.00
Stock - Raytheon Technologies	\$ 16,752.72
Stock - Shell PLC	\$ 5,695.00
Stock - United Parcel	\$ 7,475.12
Merrill Lynch IRA Reserve Account - Cash	\$ 24,632.72
Merrill Lynch IRA Investment Account - Cash	\$ 174,077.52
Stock - Caterpillar Inc	\$ 23,956.00
Stock - Disney Co	\$ 17,376.00
Stock - Emerson Elec	\$ 38,424.00
Stock - McDonalds Corp	\$ 52,706.00
Stock - Nextera Energy	\$ 33,440.00
Stock - Pfizer Inc	\$ 5,124.00
Stock - Procter & Gamble Co	\$ 15,156.00
Stock - Stryker Corp	\$ 171,143.00
Vanguard Federal Money Market	\$ 39,737.70
Vanguard 500 Index Admiral Mutual Fund	\$ 21,719.34
Vanguard Balanced Index Admiral Mutual Fund	\$ 31,703.11
Vanguard High Dividend Yield Index Admiral Mutual Fund	\$ 38,148.88
Vanguard Mid Cap Index Admiral Mutual Fund	\$ 4,398.53
Vanguard Real Estate Index Admiral Mutual Fund	\$ 29,081.81

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Description of Asset	Value of Asset
Vanguard Small Cap Index Admiral Mutual Fund	\$ 14,154.03
Vanguard Total Bond Market Index Admiral Mutual Fund	\$ 19,666.64
Vanguard Total Intl Stock Index Admiral Mutual Fund	\$ 30,053.95
Vanguard Total Stock Market Index Admiral Mutual Fund	\$ 34,112.96
Vanguard Wellesley Income Mutual Fund	\$ 28,742.65
Vanguard Communication Services ETF	\$ 3,536.75
Vanguard Consumer Discretionary ETF	\$ 7,008.64
Vanguard Growth ETF	\$ 7,458.85
Vanguard Information Technology ETF	\$ 7,985.25
Fidelity Government Money Market - Cash	\$ 100,342.09
Stock - Apple Inc	\$ 31,183.20
Stock - Amazon Inc	\$ 8,400.00
Stock - Apple Hospitality REIT	\$ 9,468.00
ETF - Ark	\$ 1,562.00
Stock - Alibaba Group	\$ 4,404.50
Stock - Caterpillar Inc	\$ 11,978.00
Stock - Costco	\$ 11,412.50
Stock - Salesforce Inc	\$ 4,508.06
Stock - Chervron	\$ 17,949.00
Stock - Dominion Energy	\$ 8,584.80
Stock - Duke Energy	\$ 11,328.90
Stock - Elevance Health	\$ 12,824.25
Fidelity Equity Income Mutual Fund	\$ 10,515.12
Fidelity Nasdaq Mutual Fund	\$ 7,572.86
Fidelity Select Defense Mutual Fund	\$ 9,466.21
Fidelity Select Semiconductors Mutual Fund	\$ 8,570.67
Fidelity Select Health Care Services Mutual Fund	\$ 10,909.53
Fidelity Select Med Tech Mutual Fund	\$ 24,204.81
Fidelity Select Health Care Mutual Fund	\$ 23,342.93

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Description of Asset	Value of Asset
Fidelity Select Fin Tech Mutual Fund	\$ 7,409.15
Fidelity Select MSCI Information Mutual Fund	\$ 7,560.80
Fidelity Select 500 Index Mutual Fund	\$ 9,447.79
Stock - Alphabet Inc CL A	\$ 10,587.60
Stock - Honeywell Intl	\$ 12,858.00
Stock - Illinois Tool Works	\$ 11,015.00
Stock - Jabil Inc	\$ 10,230.00
Stock - KLA Corp	\$ 9,425.75
Stock - Lockheed Martin	\$ 9,729.80
Stock - Mastercard	\$ 6,954.60
Stock - Merck	\$ 11,095.00
Stock - Microsoft	\$ 23,982.00
Stock - Nvidia	\$ 11,691.20
Stock - Occidental Petroleum	\$ 9,448.50
Stock - Paychex	\$ 11,556.00
Stock - Pepsico	\$ 18,066.00
Stock - Pfizer	\$ 5,124.00
Stock - Paypal	\$ 7,122.00
Stock - Southern Co	\$ 14,282.00
Stock - Skyworks Solutions	\$ 4,556.50
Stock - AT&T	\$ 11,966.50
Stock - US Bancorp	\$ 8,722.00
Stock - Verizon	\$ 3,940.00
Stock - Warner Bros	\$ 1,488.36
Stock - Walmart Inc	\$ 7,089.50
Stock - Exxon Mobil	\$ 14,339.00
Stock - Zoetis	\$ 7,327.50

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Northwest Federal Credit Union	P.O. Box 1229, Herndon, VA 20172-1229	\$ 35,674.25

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
State of Florida	200 E Gaines Street, Tallahassee, FL 32309	\$ 166,411.02
Fidelity Government Money Market Dividend	499 Washington Blvd, Jersey City, NJ 07310	\$ 1,268.63
Vanguard Real Estate Index Mutual Fund Dividend	P.O Box 982901, El Paso, TX 79998-2901	\$ 1,137.92
Vanguard Wellesley Income Mutual Fund Dividend	P.O. Box 982901, El Paso, TX 79998-2901	\$ 2,205.34
Vanguard High Dividend Mutual Fund Dividend	P.O. Box 982901, El Paso, TX 79998-2901	\$ 1,138.74
Johnson and Johnson Dividend	New Brunswick, New Jersey	\$ 1,780.00
Stryker Corp Dividend	Kalamazoo, Michigan	\$ 1,946.00
McDonalds Corp	Chicago, Illinois	\$ 1,132.00

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.

Robert R. Wheeler

Digitally signed: 05/06/2023

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