

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 05/08/2023

General Information

Name: Chris Patricca
Address: 11433 Pembroke Run, Estero, FL 33928 **PID 267989**
County: Lee

AGENCY INFORMATION

Organization	Suborganization	Title
Lee County Public Schools	Elected Constitutional Officer	School Board Member District 3

Net Worth

My Net Worth as of May 8, 2023 was \$ 370,937.00.

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 \$ 60,500.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
11433 Pembroke Run, Estero, FL 33928	\$ 340,746.00
TrustCo Bank	\$ 5,795.00
Synchrony Bank	\$ 107,283.00
Truist Bank	\$ 34,914.00
General Electric	\$ 1,513.00
TLP Financial Services, Inc.	\$ 95,800.00
Pinehaven Country Club (Albany, NY)	\$ 3,000.00
Invesco S&P 500 Equal Weight ETF	\$ 6,436.00
Schwab US Large-Cap ETF	\$ 53,871.00
Schwab US Small-Cap ETF	\$ 15,159.00
Vanguard FTSE Developed Markets	\$ 46,776.00
Vanguard FTSE Emerging Markets	\$ 12,459.00
Abrdn Bloomberg All Commodity Strat	\$ 3,415.00
SEI Daily Government Fund	\$ 1,221.00
VALIC FGCU Retirement Plan	\$ 7,860.00
Florida Retirement System	\$ 40,018.00

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Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Union Home Mortgage	8241 Dow Circle, Strongville, OH 44136	\$ 370,029.00

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.

PRIMARY SOURCES OF INCOME:

Name of Source of Income Exceeding \$1,000	Address of Source of Income	Amount
Lee County School District	2855 Colonial Blvd, Fort Myers, FL 33966	\$ 47,500.00
TLP Financial Services, Inc.	11433 Pembroke Run, Estero, FL 33928	\$ 21,600.00

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
TLP Financial Services, Inc.	Business Profits	11433 Pembroke Run, Estero, FL 33928	Financial Planning

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.

Chris Patricca

Digitally signed: 05/08/2023

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