

## 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<br>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   |

**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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