

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/07/2023

General Information

Name: Hon Jan Shackelford

CONFIDENTIAL

Address: M.C. Blanchard Judicial Building 190 Governmental Center, 5th Floor, Pensacola, FL 32502 **PID 14304**

County: Escambia

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (1St)	Elected Constitutional Officer	Circuit Judge

Net Worth

My Net Worth as of December 31, 2022 was \$ 3,038,446.00.

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 \$ 150,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Residence-{REDACTED}	\$ 585,000.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
N/A		

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.

☐ 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
See Attached		

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.

Jan Shackelford

Digitally signed: 06/07/2023

Filed with COE: 06/07/2023

JAN SHACKELFORD-Form 6

Part B: Intangible Assets as of December 31, 2022

Bank Accounts*

Bank of America -Checking Account	\$ 40,800		
Regions Bank			
Money Market	\$ 6,100		
Money Market	\$ 4,400		
Checking Account	\$ 4,100		
Checking Account	\$ 6,400		
Checking Account	\$ 4,800		
Members First Checking	\$ 1,600		
<u>Total – Checking and MMA</u>			<u>\$ 68,200</u>

Securities*

VirtusAllianz IRA			
Vrts NFJ Mid-Cap Value-A			<u>\$146,700</u>

Charles Schwab (Multiple Accounts)*

Schwab One Account			
Cash		\$182,102	
AT & T	\$ 14,088		
Alphabet Inc	\$ 8,823		
Boeing	\$ 32,383		
Centene	\$ 4,100		
Delta	\$ 6,572		
Marriott	\$ 14,889		
Microsoft	\$ 26,927		
Fidelity Contrafund	\$ 7,475		
<i>Total Equities</i>		\$115,237	
<u>Total Schwab One Account</u>			<u>\$297,339</u>

Investment Acct

Cash		\$ 15,678	
Allegro Micro	\$ 6,004		
Alphabet	\$ 3,529		
American Airlines	\$ 305		
Boeing	\$ 21,906		
Delta Airlines	\$ 6,572		
<i>Total Equities</i>		\$ 38,317	
<u>Total Investment Acct</u>			<u>\$ 53,995</u>

Jan Shackelford-Assets-Page 2 (Continued)**Benjamin Edwards (Multiple Accounts)***

Cash/Bank Deposits	\$ 4,160		
Southern Company Stock	\$ 61,230		
New Perspective Fund A	\$ 54,072		
Growth Fund of America Class A	\$107,662		
Capital World Growth A	\$ 95,117		
Franklin Fund Class A	\$115,029		
Capital World Growth F-1	\$ 29,733		
Cybersecurity ETF	\$ 7,742		
Cloud Computing ETF	\$ 7,214		
<i>Sub Total Acct 600</i>		\$481,960	
529 Plans			
Capital World Growth Class A	\$ 5,275		
Growth Fund of America Class A	\$ 4,659		
Capital World Growth Class A	\$ 1,319		
Growth Fund of America Class A	\$ 1,164		
<i>Sub Total 529 Plans</i>		\$ 12,417	
Individual IRA			
Cash	\$ 8,336		
Marriott	\$ 1,772		
Regions Financial	\$ 2,156		
Fidelity Contra Fund	\$ 4,346		
<i>Sub Total IRA</i>		\$ 18,559	
<u>Total Benjamin Edwards Accts.</u>			<u>\$512,936</u>

State of Florida-Deferred Comp Plan through Nationwide*

<u>Fixed Account</u>	\$288,003		
Fid Contra	\$ 88,164		
Vanguard	\$110,722		
T Rowe New Horizons	\$ 81,125		
<i>Nationwide subtotal</i>		\$568,014	
<u>Charles Schwab-Self Directed</u>			
Cash	\$ 42,201		
Allegro Micro	\$ 3,002		
Alphabet	\$ 3,529		
Boeing Co	\$ 6,667		
Exxon	\$ 1,103		
Marathon Oil	\$ 1,103		
Moderna	\$ 1,354		
Novo-Nordisk	\$ 2,030		
Phillips 66	\$ 2,673		
<i>Subtotal Self Directed</i>		\$ 66,151	
<u>Total Deferred Comp Plan</u>			<u>\$634,165</u>

Jan Shackelford-Assets-Page 3 (Continued)**UBS***

Cash	\$ 39,662	
Abbvie	\$ 10,828	
Alphabet Inc	\$ 19,521	
Amazon	\$ 20,244	
Apollo Global	\$ 12,822	
Apple Inc	\$ 28,715	
Blackstone	\$ 7,567	
Broadcom	\$ 14,537	
Chevron Corp	\$ 24,411	
Constellation Brands	\$ 9,270	
Costco	\$ 7,761	
Crowdstrike	\$ 4,738	
CVS Health	\$ 12,022	
Danaher	\$ 9,821	
Home Depot	\$ 23,374	
Honeywell	\$ 10,286	
Lam Research	\$ 4,623	
Marvell Technology	\$ 11,445	
Mastercard Inc	\$ 7,302	
McDonalds	\$ 10,541	
Meta	\$ 5,776	
Microsoft	\$ 25,421	
Morgan Stanley	\$ 680	
Nextera	\$ 14,714	
Nvida	\$ 5,699	
Palo Alto Networks	\$ 1,256	
Paypal	\$ 7,478	
Raytheon	\$ 15,138	
Salesforce Com	\$ 9,679	
ServiceNow	\$ 3,106	
Thermo Fisher	\$ 13,217	
United Health Group	\$ 20,677	
Visa	\$ 14,751	
Walt Disney	\$ 3,215	
<i>Stock Holdings & cash</i>		\$430,296
Pacer US Cash	\$ 10,822	
Calvert Equity	\$ 1,248	
Janus Henderson	\$ 7,419	
Transamerica Capital	\$ 20,900	
Capital Group Fixed Income	\$ 8,401	
Preferred Security	\$ 10,315	

Shackelford-Assets-Page 4 (Continued)

Allspring	\$ 690		
American Century	\$ 9,753		
American Century	\$ 711		
Bramshill Multi-Strategy	\$ 9,729		
Eaton Vance Short	\$ 18,066		
Eaton Vance Short	\$ 10,826		
Eaton Vance Floating	\$ 715		
Hartford Short	\$ 10,774		
Duration Income	\$ 9,997		
Putnam Ultra	\$ 10,911		
First Trust Merger Arbitrage	\$ 14,620		
First Trust Global	\$ 3,918		
<i>Subtotal other Equities, etc.</i>		\$159,815	
<u>Total UBS Acct</u>			<u>\$590,111</u>
Total Intangible Assets			\$2,303,446

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Part D: Income Over \$1000 in 2022

1. State of Florida State Court System 200 E. Gaines St. Tallahassee, FL 32399	Annual Salary (eff. 7/1/22)	\$182,060
2. Virtus Mutual Funds (f/k/a Allianz) P.O. Box 9874 Providence, RI 02940-8074	RMD	\$ 6,128
3. Benjamin Edwards & Co. Pershing LLC One Pershing Plaza Jersey City, NJ 07399		
American Capital World G&I (A)	Dividends	\$ 2,081
Franklin Income Fund	Dividends	\$ 1,408
American Growth Fund of America	LTCG	\$ 3,850
American New Perspective Fund	LTCG	\$ 1,727
Southern Company	Dividends	\$ 2,317
4. Charles Schwab & Co. 211 Main Street San Francisco, CA 94105	(Two Accounts)	
Franklin Growth	Dividends	\$ 1,112
Microsoft	STCG	\$ 1,329
5. UBS 3801 PGA Boulevard, Suite 1000 Palm Beach Gardens, FL 33410		
Pimco Dynamic Income FD	Dividends	\$ 1,623

Key:

LTCG=	Long Term Capital Gain
RMD=	Required Minimum Distribution from Inherited IRA
STCG=	Short Term Capital Gain