

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/30/2023

General Information

Name: Sen Jonathan Martin

Address: 2000 Main Street Suite 401, Fort Myers, FL 33901

PID 220453

County:

AGENCY INFORMATION

Organization	Suborganization	Title
Senate	Elected Constitutional Officer	State Senator, District 33

Net Worth

My Net Worth as of December 31, 2022 was \$ 700,000.00.

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 \$ 211,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Residence (Address Exempt pursuant to F.S. 119)	\$ 900,000.00
Residence (Address Exempt pursuant to F.S. 119)	\$ 425,000.00
Diplomat Boat & RV (4% ownership interest)	\$ 160,000.00
Cogent Bank Stock (7,500 Shares)	\$ 15,000.00
Fidelity Brokerage Account	\$ 1,168.10
FRS U.S. Stock Fund (340)	\$ 1,098.72
Amer Funds 2045 Target Date Retire R3	\$ 15,033.79
Amer Funds AMCAP R3	\$ 20,956.07
Amer Funds Global Growth Portfolio R3	\$ 21,569.20
Amer Funds New Economy R3	\$ 14,058.43
Suncoast Credit Union (Checking Account)	\$ 4,812.00

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Penny Mac (Residence Mortgage)	PO Box 514387, Los Angeles, CA 90051	\$ 438,955.60
Navient (Student Loans)	PO Box 9500 Wilkes-Barre, PA 18773	\$ 42,306.18
Suncoast Credit Union (Auto Loan)	PO Box 11904, Tampa, FL 33680	\$ 26,975.75
USAA (Credit Card)	9800 Fredericksburg Road, San Antonio, TX 78288	\$ 7,481.23
Thomasville Bank (Residence Mortgage)	301 North Broad Street, Thomasville, GA 31792	\$ 358,500.00

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.

☐ 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
Aloia Roland Lubell & Morgan PLLC	2222 Second Street, Fort Myers, FL 33901	\$ 51,923.07
State of Florida	200 E Gaines Street, Tallahassee, FL 32399	\$ 4,288.74
Parvey & Cavenago Attorneys, P.A.	2069 First Street, Fort Myers, FL 33901	\$ 173,311.73

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.

Jonathan Martin

Digitally signed: 06/30/2023

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