

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/21/2023

General Information

Name: Joan Michelle Stone

Address: 601 SE 25th Avenue, Ocala, FL 34471

PID 266374

County: Marion

AGENCY INFORMATION

Organization	Suborganization	Title
Marion County	Community Redevelopment Agency	County Commissioner, District 5
Marion County	Elected Constitutional Officer	County Commissioner, District 5
Withlacoochee Reg. Water Supply Authority	Board of Directors	Board of Directors Member

Net Worth

My Net Worth as of December 31, 2022 was \$ 6,764,669.00.

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 \$ 180,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
MainStreet Community Bank, 112 N. Magnolia Ave Ocala, FL 34475	\$ 119,680.00
Stone Petroleum Products, Inc, 904 SE 1st Terr Ocala, FL 34475	\$ 5,000,000.00
Stone Property Holdings, LLC, 904 SE 1st Terr Ocala, FL 34475	\$ 500,000.00
Personal Residence, 5170 NW 110th Ave Ocala, FL 34482	\$ 995,000.00
Suntrust Bank Retirement Plan, P.O. Box 199749 Dallas, TX 75219	\$ 155,000.00
Raymond James & Assoc. 1294 SE 24th Rd Ocala, FL 34471	\$ 164,574.11
FRS Pension Investment	\$ 77,415.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
PNC Bank	2620 SW 19th Ave Rd Ocala, FL 34471	\$ 415,000.00
Jaguar Finance	P.O. Box 78232 Phoenix, AZ 85062	\$ 12,000.00

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
Marion Co. Board of County Commissioners	601 SE 25th Ave Ocala, FL 34471	\$ 97,034.00

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

- ☒ 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.

Joan Michelle Stone

Digitally signed: 06/21/2023

Filed with COE: 06/21/2023

JERRY FURLONG
 Raymond James Financial Services, Inc.
 Raymond James Financial Services Advisors, Inc.
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Joan IRA Freedom Equity Income
 JOAN MICHELLE STONE IRA
 RJ TRUST CO NH - CUSTODIAN
 5170 NW 110TH AVE
 OCALA FL 34482-1832708

Raymond James Client Services
 800-647-SERV (7378)
 Monday - Friday 8 a.m. to 9 p.m. ET

Online Account Access
raymondjames.com/clientaccess

Linked Account Summary - Primary Account

		This Statement	Year to Date
Value This Statement			
\$164,574.71			
Beginning Balance		\$174,288.35	\$174,150.40
Deposits ♦		\$0.00	\$0.00
Income		\$3,049.70	\$7,561.24
Withdrawals ♦		\$0.00	\$0.00
Expenses		\$0.00	\$(1,683.80)
Change in Value		\$(12,763.34)	\$(15,453.13)
Ending Balance		\$164,574.71	\$164,574.71

♦ Figures reflect a summary of activity in all linked accounts, including internal transfers between accounts.

Linked Accounts

Account	Current Value	Estimated Annual Income	Page
Joan IRA Freedom Equity Income	\$115,308.10	\$3,942.69	3
Joan IRA	\$49,266.61	\$1,242.99	11
Total Relationship Value	\$164,574.71	\$5,185.68	

JERRY FURLONG

Raymond James Financial Services, Inc.
Raymond James Financial Services Advisors, Inc.

Joan IRA Freedom Equity Income Account Summary -

Advisory

Registered to: JOAN MICHELLE STONE IRA | RJ TRUST CO NH - CUSTODIAN | 5170 NW 110TH AVE | OCALA FL 34482-1832708

		This Statement	Year to Date
Value This Statement			
\$115,308.10			
Beginning Balance		\$117,909.85	\$123,714.76
Deposits		\$0.00	\$0.00
Income		\$3,049.28	\$6,334.02
Withdrawals		\$0.00	\$0.00
Expenses		\$0.00	\$(1,608.80)
Change in Value		\$(5,651.03)	\$(13,131.88)
Ending Balance		\$115,308.10	\$115,308.10
Last Statement			
Prior Year-End			
\$117,909.85			\$123,714.76
Time-Weighted Performance*			
YTD			Annualized Since 10/16/2014
(6.80)%			4.72%

Performance Inception: 10/16/2014

Important Messages

- Your account purpose is Wealth Accumulation & Provide Income, with a moderate risk tolerance and a 10 to 20 year time horizon.
- Realized gain/loss summary (Please see Cost Basis on the Understanding Your Statement page.)

	Year-To-Date
• Short-term gains	\$79.74
• Short-term losses	\$(5.67)
• Long-term gains	\$507.79
• Long-term losses	\$(50.72)
Net Gain/Loss Total	\$531.14

- Your Distribution Standing Withholding Elections

- Federal Withholding Election (No Election on File)
- State (FL) Withholding Election (State Withholding not available)

Please see Standing Withholding Elections on the Understanding Your Statement page.

- Primary Beneficiaries: Charles Stone (100.00%)
- For your IRA account, the ending balance displayed on this statement represents the year end fair market value that we must furnish to you and the Internal Revenue Service as part of the IRS Form 5498 reporting requirements.

JERRY FURLONG
Raymond James Financial Services, Inc.

Joan IRA Account Summary -

Brokerage

Registered to: JOAN MICHELLE STONE IRA | RJ TRUST CO NH - CUSTODIAN | 5170 NW 110TH AVE | OCALA FL 34482-1832708

Value This Statement

\$49,266.61

Last Statement Prior Year-End
\$56,378.50 \$50,435.64

Dollar-Weighted Performance*

YTD Annualized Since 07/21/2014
(2.17)% 33.23%

Performance Inception: 07/21/2014

	This Statement	Year to Date
Beginning Balance	\$56,378.50	\$50,435.64
Deposits	\$0.00	\$0.00
Income	\$0.42	\$1,227.22
Withdrawals	\$0.00	\$0.00
Expenses	\$0.00	\$(75.00)
Change in Value	\$(7,112.31)	\$(2,321.25)
Ending Balance	\$49,266.61	\$49,266.61

Important Messages

- Your account purpose is Wealth Accumulation & Provide Income, with an aggressive risk tolerance and a 10 to 20 year time horizon.
- Your Distribution Standing Withholding Elections
 - Federal Withholding Election (No Election on File)
 - State (FL) Withholding Election (State Withholding not available)
 Please see Standing Withholding Elections on the Understanding Your Statement page.
- Primary Beneficiaries: Charles Stone (100.00%)
- For your IRA account, the ending balance displayed on this statement represents the year end fair market value that we must furnish to you and the Internal Revenue Service as part of the IRS Form 5498 reporting requirements.

Your Portfolio

For more information,
visit raymondjames.com/clientaccess

	Quantity	Price	Value	Gain or (Loss)*	Estimated Annual Income
Cash & Cash Alternatives					
Raymond James Bank Deposit Program *			\$1,999.77		\$4.99
0.25% - Selected Sweep Option					
Goldman Sachs Bank USA			\$1,999.77		

Your bank priority state: FL

Participating banks recently added: KeyBank National Association 11/30/2022; Customers Bank 11/30/2022; Webster Bank 08/31/2022

* Please see the Raymond James Bank Deposit Program on the Understanding Your Statement page.

Estimated Income Yield for RJBDP was calculated as of 12/27/2022.

Cash & Cash Alternatives Total **\$1,999.77** **\$4.99**