

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/23/2023

General Information

Name: Vickie L Potts **CONFIDENTIAL**
Address: 18500 Murdock Cir Rm 232, Pt Charlotte, FL 33948 **PID 33489**
County: Charlotte

AGENCY INFORMATION

Organization	Suborganization	Title
Charlotte County	Elected Constitutional Officer	Tax Collector

Net Worth

My Net Worth as of December 31, 2022 was \$ 660,142.03.

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 \$ 115,532.75.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
{REDACTED}	\$ 279,812.00
Lot, Charlotte County {REDACTED}	\$ 11,900.00
Bank Accounts (Florida Central Credit Union) PO Box 18605 Tampa FL	\$ 33,626.04
FRS - FRS Stable Value Fund FRS PO Box 9000 Tallahassee FL	\$ 354,387.15
Bonds - Fidelity VIP Investment Grade Bond Port, Equitable 9530 Marketplace Rd Suite 101 FT Myers FL	\$ 12,040.22
Large Cap Growth Stocks - T. Rowe Price Growth Stock R, Equitable 9530 Marketplace Rd Suite 101 FT Myers FL	\$ 2,827.07
Large Cap Value Stocks - Columbia Dividend Income Fund R, Equitable 9530 Marketplace Rd Suite 101 FT Myers FL	\$ 5,310.31
Mid Cap Stocks EQ/Mid Cap Index, Equitable 9530 Marketplace Rd Suite 101 FT Myers FL	\$ 3,178.88
Small Cap Stocks - Federated Hermes Clover Small Value R, Equitable 9530 Marketplace Rd Suite 101 FT Myers FL	\$ 1,373.30
Interntl/Global Stocks - INVESCO Internationa Diversified R, Equitable 9530 Marketplace Rd Suite 101 FT Myers FL	\$ 2,668.85
Interntl/Global Stocks - MFS International Growth R1, Equitable 9530 Marketplace Rd Suite 101 FT Myers FL	\$ 1,589.52
Quintaflex II - 457 Voya ReliaStar Life Insurance Company PO Box 1559 Hartford CT	\$ 9,843.98
529 College Savings Plan Cigam 529 American Balanced C - Edward Jones 223 Taylor St Suite 1118 Punta Gorda FL	\$ 3,861.99
Escro Account Wells Fargo PO Box 14411 Des Moines IA	\$ 4,957.69

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Wells Fargo	PO Box 105647 Atlanta GA 30348-5647	\$ 139,209.50
GM Financial	PO Box 78143 Phoenix AZ 85062-8143	\$ 28,717.75

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
Charlotte County Tax Collector	18500 Murdock Cr Port Charlotte FL 33948	\$ 141,147.56
FRS Division of Retirement	PO Box 9000 Tallahassee FL 32315-9000	\$ 104,483.22

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.

Vickie L Potts

Digitally signed: 06/23/2023

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