

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/30/2023

General Information

Name: Maria Teresa Rojas

Address: 1450 NE 2ND AVE STE 700, MIAMI, FL 33132

PID 62224

County: Miami-Dade

AGENCY INFORMATION

Organization	Suborganization	Title
Miami-Dade County Public Schools	Elected Constitutional Officer	

Net Worth

My Net Worth as of December 31, 2022 was \$ 2,545,590.09.

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 \$ 35,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
CITY NATIONAL BANK, 2855 LEJEUNE ROAD, CORAL GABLES, FL 33134 CHECKING ACCOUNT	\$ 146,045.00
EDFED, PO BOX 830310, MIAMI, FL 33283 SAVINGS ACCOUNT	\$ 71,508.00
TRUIST BANK, PO BOX 305183, NASHVILLE, TN 37230 SAVINGS ACCOUNT	\$ 2,151.09
MDCPS - VOYA FINANCIAL, PO BOX 5050, MINOT, ND 58702- CONTRACT ID:CONVTS0065**5E1 (FIXED ANNUITY)	\$ 140,396.00
MDCPS - VOYA FINANCIAL, PO BOX 5050, MINOT, ND 58702- CONTRACT ID:CONVTS0065**5EF(FIXED ANNUITY)	\$ 73,557.00
MDCPS - VOYA FINANCIAL, PO BOX 5050, MINOT, ND 58702- CONTRACT ID:CONVTS0065**5RR(FIXED ANNUITY)	\$ 170,254.00
IRA- CBLIFE, 2327 ENGLERT DRIVE, DURHAM, NC, 27713- CONTRACT ID:*****256 (FIXED ANNUITY)	\$ 233,509.00
612 VERLARDE AVE, CORAL GABLES, FL 33134 (PERSONAL RESIDENCE)	\$ 1,375,000.00
19201 COLLINS AVE #310, SUNNY ISLES BEACH, FL 33160 (SECOND HOME)	\$ 300,000.00
6231/6233 SW 21 ST, MIAMI, FL 33155 (33% OWNED RENTAL PROPERTY) SEE ATTACHMENT	\$ 200,000.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
SLS (HOME MORTGAGE)	8742 LUCENT BLVD, HIGHLANDS RANCH, CO 80129	\$ 108,000.00
CHASE BANK (HELOC)	PO BOX 469030, GLENDALE, CO 80246	\$ 83,000.00
JAGUAR FINANCIAL GROUP (AUTO LEASE)	PO BOX 78058, PHOENIX, AZ 85062-8058	\$ 10,830.00

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

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

Identify each separate source and amount of income which exceeded \$1,000 during the year, including secondary sources of income.

PRIMARY SOURCES OF INCOME:

SECONDARY SOURCES OF INCOME (Major customers, clients, etc. of businesses owned by reporting person):

Interests in Specified Businesses

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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.

CPA/Attorney Signature Only

I, **Jose A Riesco CPA** prepared the CE Form 6 in accordance with Art. II, Sec. 8, Florida Constitution, Section 112.3144, Florida Statutes, and the instructions to the form. Upon my reasonable knowledge and belief, the disclosure herein is true and correct.

Jose A Riesco CPA

Digitally signed: 06/30/2023

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.

Maria Teresa Rojas

Digitally signed: 06/30/2023

Filed with COE: 06/30/2023

MARIA TERESA ROJAS

FORM 6

Full and Public Disclosure of Financial Interests

2022

ATTACHMENT

ASSETS and INCOME

Disclosure statement regarding a Duplex Property located at 6231/6233 SW 21st Street, Miami, FL 33155. This property is a duplex that was purchased many years ago by the grandparents of Ms. Rojas. After her grandfather passed away, the property passed on to her grandmother. Upon the death of her grandmother, the property then passed on to her mother and father, and as of today her mother who is still alive, is considered the owner of the property. However, on January 27, 2022, her mother inadvertently executed a Quick Claim Deed, which effectively gave Ms. Rojas and her sister, a 33% interest to each of them as of that date. Her reason being was to avoid probate after her death, but certain unintended tax consequences have arisen as a result of this, and now the transaction is being looked at closely for possible revocation and correction. There appears to be grounds for this given the advanced age of her mother and the obvious lack of knowledge of tax laws, as well as the apparent misunderstanding and disconnect between her mother and the person preparing the documents of what the realistic goals of the asset protection and estate planning were.

In an abundance of caution and in the spirit of transparency, in light of the uncertainty disclosed above, Ms. Rojas' Form 6 shows an Asset with a 33% interest in a Rental Property, and a corresponding Income amount for the 2022 year. This is what we have today. Should circumstances change in the future, appropriate Amended forms and corrections will be prepared and filed.