

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/23/2023

General Information

Name: Dr James Surrency

Address: Po Box 703, Trenton, FL 32693

PID 11177

County: Gilchrist

AGENCY INFORMATION

Organization	Suborganization	Title
Florida Gateway College	Board Of Trustees	Board of Trustee
Gilchrist County School Board	Elected Constitutional Officer	Superintendent

Net Worth

My Net Worth as of June 23, 2023 was \$ 1,976,818.30.

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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 \$ 2,003,146.79.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Home 779 sw 103 st Trenton, Florida 32693	\$ 254,300.00
2022 Nissan Frontier	\$ 32,327.00
Jackson National - Direct Rollover IRA	\$ 422,553.27
Great American Annuities	\$ 120,320.87
AVIVA Life & Annuity Co	\$ 58,026.00
Midland National Life Insurance Company	\$ 5,412.55
AIG Annuities	\$ 314,721.51
Reliance Standard	\$ 120,880.61
Savings Capital City and Ameris Bank	\$ 338,603.43
Checking	\$ 336,001.55

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Mid-Florida Credit Union	PO Box 8008 Lakeland, FL 33802	\$ 26,328.48

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

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.

James Surrency

Digitally signed: 06/23/2023

Filed with COE: 06/23/2023

Department of the Treasury—Internal Revenue Service
U.S. Tax Return for Seniors

2022

OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

☐ Single ☒ Married filing jointly ☐ Married filing separately (MFS)
☐ Head of household (HOH) ☐ Qualifying surviving spouse (QSS)

If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent:

Your first name and middle initial JAMES A		Last name SURRENCY		Your social security number ■■■■■	
If joint return, spouse's first name and middle initial CONSTANCE K		Last name SURRENCY		Spouse's social security number	
Home address (number and street). If you have a P.O. box, see instructions. PO BOX 703				Apt. no.	
City, town, or post office. If you have a foreign address, also complete spaces below. TRENTON		State FL		ZIP code 32693	
Foreign country name		Foreign province/state/county		Foreign postal code	

Presidential Election Campaign

Check here if you, or your spouse if filing jointly, want \$3 to go to this fund.
Checking a box below will not change your tax or refund.

☐ You ☐ Spouse

Digital Assets

At any time during 2022, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.)

☐ Yes ☒ No

Standard Deduction

Someone can claim: ☐ You as a dependent ☐ Your spouse as a dependent
☐ Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness ☐ You: ☒ Were born before January 2, 1958 ☐ Are blind
☐ Spouse: ☒ Was born before January 2, 1958 ☐ Is blind

Dependents

(see instructions):

(1) First name	Last name	(2) Social security no.	(3) Relationship to you	(4) Check the box if qualifies for (see instructions):
				Child tax credit
				Credit for other dependents

If more than four dependents, see instructions and check here ☐

Income

1a Total amount from Form(s) W-2, box 1 (see instructions)	1a	113,323
b Household employee wages not reported on Form(s) W-2	1b	
c Tip income not reported on line 1a (see instructions)	1c	
d Medicaid waiver payments not reported on Form(s) W-2 (see instructions)	1d	
e Taxable dependent care benefits from Form 2441, line 26	1e	
f Employer-provided adoption benefits from Form 8839, line 29	1f	
g Wages from Form 9919, line 6	1g	
h Other earned income (see instructions)	1h	
i Nontaxable combat pay election (see instructions)	1i	
z Add lines 1a through 1h	1z	113,323
2a Tax-exempt interest	2a	
3a Qualified dividends	3a	
4a IRA distributions	4a	
5a Pensions and annuities	5a	105,879
6a Social security benefits	6a	56,927
b Taxable interest	2b	281
b Ordinary dividends	3b	
b Taxable amount	4b	
b Taxable amount	5b	96,509
b Taxable amount	6b	48,388
c If you elect to use the lump-sum election method, check here (see instructions)		
7 Capital gain or (loss). Attach Schedule D if required. If not required, check here	7	

Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld. If you did not get a Form W-2, see instructions.

Attach Schedule B if required.

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions.

Form 1040-SR (2022)

CURRENCY

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Other income from Schedule 1, line 10	8	4,000
Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income	9	262,501
Adjustments to income from Schedule 1, line 26	10	283
Subtract line 10 from line 9. This is your adjusted gross income	11	262,218
Standard deduction or itemized deductions (from Schedule A)	12	28,700
Qualified business income deduction from Form 8995 or Form 8995-A	13	743
Add lines 12 and 13	14	29,443
Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income	15	232,775
Tax and Credits		
16 Tax (see instructions). Check if any from: 1 ☐ Form(s) 8814 2 ☐ Form 4972 3 ☐	16	43,537
17 Amount from Schedule 2, line 3	17	
18 Add lines 16 and 17	18	43,537
19 Child tax credit or credit for other dependents from Schedule 8812	19	
20 Amount from Schedule 3, line 8	20	
21 Add lines 19 and 20	21	
22 Subtract line 21 from line 18. If zero or less, enter -0-	22	43,537
23 Other taxes, including self-employment tax, from Schedule 2, line 21	23	577
24 Add lines 22 and 23. This is your total tax	24	44,114
Payments		
25 Federal income tax withheld from: a Form(s) W-2	25a	9,866
b Form(s) 1099	25b	7,718
c Other forms (see instructions)	25c	
d Add lines 25a through 25c	25d	17,584
26 2022 estimated tax payments and amount applied from 2021 return	26	
27 Earned income credit (EIC)	27	
28 Additional child tax credit from Schedule 8812	28	
29 American opportunity credit from Form 8863, line 8	29	
30 Reserved for future use	30	
31 Amount from Schedule 3, line 15	31	
32 Add lines 27, 28, 29, and 31. These are your total other payments and refundable credits	32	
33 Add lines 25d, 26, and 32. These are your total payments	33	17,584

Go to www.irs.gov/Form1040SR for instructions and the latest information.

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Line 33 is more than line 24, subtract line 24 from line 33. This is the amount you overpaid	34	
Amount of line 34 you want refunded to you. If Form 8888 is attached, check here.....	35a	
b Routing number		c Type: ☐ Checking ☐ Savings
d Account number		
36 Amount of line 34 you want applied to your 2023 estimated tax	36	
37 Subtract line 33 from line 24. This is the amount you owe. For details on how to pay, go to www.irs.gov/Payments or see instructions	37	27,399
38 Estimated tax penalty (see instructions).....	38	869

Third Party Designee

Do you want to allow another person to discuss this return with the IRS? See instructions

☐ Yes. Complete below. ☒ No

Designee's name

Phone no.

Personal identification number (PIN)

Sign Here

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature

Date

Your occupation

If the IRS sent you an Identity Protection PIN, enter it here (see inst.)

Spouse's signature. If a joint return, both must sign.

Date

Spouse's occupation

If the IRS sent your spouse an Identity Protection PIN, enter it here (see inst.)

Phone no. 352-463-6649

Email address SURRENCYJAMES@BELLSOUTH.NET

Paid Preparer Use Only

Preparer's name

Preparer's signature

Date

PTIN

Check if:

SHIRLEY MATTHEWS

03-04-2023

00252648

☐ Self-employed

Firm's name H AND R BLOCK

Phone no. 352-493-4394

Firm's address 2181 NW 11TH DR
CHIEFLAND FL 32626

Firm's EIN 592487307

Go to www.irs.gov/Form1040SR for instructions and the latest information.

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Chart*

Boxes checked in the "Age/Blindness" section of Standard Deduction on page 1 2

**AND the number of
boxes checked is...**

**THEN your standard
deduction is...**

1	\$14,700
2	16,450

Married
filing jointly

1	\$27,300
2	28,700
3	30,100
4	31,500

Qualifying
surviving spouse

1	\$27,300
2	28,700

Head of
household

1	\$21,150
2	22,900

Married filing
separately**

1	\$14,350
2	15,750
3	17,150
4	18,550

*Don't use this chart if someone can claim you (or your spouse if filing jointly) as a dependent, your spouse itemizes on a separate return, or you were a dual-status alien. Instead, see instructions.

**You can check the boxes for your spouse if your filing status is married filing separately and your spouse had no income, isn't filing a return, and can't be claimed as a dependent on another person's return.

Go to www.irs.gov/Form1040SR for instructions and the latest information.

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