

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/30/2023

General Information

Name: Hon Joel D Rudman

Address: 2045 FOUNTAIN PROFESSIONAL CT STE D, NAVARRE, FL 32566

PID 299858

County: Santa Rosa

AGENCY INFORMATION

Organization	Suborganization	Title
House Of Representatives	Elected Constitutional Officer	State Representative

Net Worth

My Net Worth as of May 31, 2023 was \$ 2,989,340.00.

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 \$ 200,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
1933 Cardinal Lane, Navarre FL	\$ 400,000.00
474 Flatwoods Forest Loop, SantaRosa Beach, FL	\$ 1,200,000.00
7552 Navarre Pkwy Ste 28 Navarre FL	\$ 300,000.00
Bank account 1 (REGIONS BANK)	\$ 60,000.00
Mass mutual ins cash value	\$ 125,000.00
TD AMERITRADE- see attached breakdown	\$ 982,000.00
BANK ACCT 2 REGIONS BANK	\$ 76,000.00
Personal account REGIONS BANK	\$ 200,000.00
Money market REGIONS BANK	\$ 69,000.00
Savings acct REGIONS BANK	\$ 103,500.00
CHECKING ACCT REGIONS BANK	\$ 1,400.00
CHECKING ACCT REGIONS BANK	\$ 1,100.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
CENLAR	POBOX 77404, EWING,NJ	\$ 482,160.00
REGIONS BANK	PO BOX 18001 Hattiesburg MS	\$ 171,500.00
REGIONS	70 N Baylen St Pensacola, FL	\$ 75,000.00

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
HOLLEY NAVARRE MED CLINIC	7552 NavarrePkwY Ste 28	\$ 220,311.00

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

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.

Joel D Rudman

Digitally signed: 06/30/2023

Filed with COE: 06/30/2023

Joel Rudman Portfolio Positions as of 05/31/2023

Ticker	Description	Units	Price	5/31/23 Market Value
18347AJS1	Clay Cnty MO Pub Sch Dist No 5 3.20% 3/1/2032	100.00	\$98.64	\$9,864.19
534366CB3	Lincoln West Haymarket Neb Jt Pub Agy Fa Go Fac Bds Callable 3.25% 12/15/2026	50.00	100.0345	5001.73
5.67E+31	Maricopa Cnty AZ Sch Dist No 028 Kyrene Elem 4.00% 7/1/2030	100.00	\$101.75	\$10,175.42
5772854U0	Maui Cnty Hawaii 3.125% 6/1/2031	100.00	\$99.91	\$9,991.39
645002YR1	New Haven CA Uni Sch Dist 5.00% 8/1/2028	100.00	\$102.04	\$10,204.42
650823CX3	Newburgh IN Sew Wks Rev 2.625% 1/1/2032	100.00	\$92.69	\$9,269.16
68609BSP3	Oregon St For Previous Issues GO Bds Callable 5.00% 5/1/2030	100.00	\$105.55	\$10,555.18
68881TBB2	Otay Ca Wtr Dist Wtr Revenue REv Bds Callable 4.00% 9/1/2030	100.00	\$103.16	\$10,316.22
791230TJ4	St Louis Cnty MN 3.125% 12/1/2029	100.00	\$100.25	\$10,025.09
848304LE9	Spencerport N Y Cent Sch Dist Go Sch Dist Bds Clbl 3.00% 6/15/2030	100.00	\$99.26	\$9,925.90
851018KU4	Springfield Mo Pub Util Rev Rev Bds Callable 4.00% 8/1/2031	100.00	\$101.78	\$10,178.25
930353KD8	Wadsworth Ohio City Sch Dist 3.50% 12/1/2031	100.00	\$100.58	\$10,057.95
941400FE8	Waterford Halfmoon NY Un Free 2.125% 6/15/2030	100.00	\$90.22	\$9,022.05
950732YY7	Wentzville MO Sch Dist No R-04 GO Ref 4.00% 3/1/2029	100.00	\$102.11	\$10,211.02
952496WD5	West Deptford Twp NJ 3.125% 9/1/2029	100.00	\$100.06	\$10,005.74
AAPL	Apple Inc	24.18	\$177.25	\$4,285.90
ABT	Abbott Laboratories	40.91	\$102.00	\$4,172.73
ADANX	AQR Diversified Arbitrage N	852.44	\$11.64	\$9,922.41
AMD	Advanced Micro Devices	25.00	\$118.21	\$2,955.25
AON	Aon PLC	10.09	\$308.29	\$3,111.89
BK	Bank of New York Mellon Corp	36.47	\$40.20	\$1,465.93
C	Citigroup Inc	36.85	\$44.32	\$1,633.05
CB	Chubb Limited	10.21	\$185.80	\$1,896.08
CL	Colgate-Palmolive Co	1.03	\$74.38	\$76.70
CORFX	Flat Rock Core Income Fund	1587.70	\$20.15	\$31,992.16
CVX	Chevron Corp	20.87	\$150.62	\$3,143.29
DE	Deere & Company	5.08	\$345.98	\$1,756.19
DHEAX	Diamond Hill Short Duration Total Ret A	814.87	\$9.46	\$7,708.67
EFG	iShares MSCI EAFE Growth ETF	98.21	\$93.15	\$9,148.17
EFV	iShares MSCI EAFE Value	423.08	\$47.60	\$20,138.65
EMR	Emerson Electric Co	51.48	\$77.68	\$3,998.66
FSK	FS KKR Capital Corp	518.56	\$19.35	\$10,034.14
FVD	First Trust Value Line Dividend Index Fund	404.93	\$38.66	\$15,654.63
GOOG	Alphabet Inc Class C	20.00	\$123.37	\$2,467.40
GSIHx	Goldman Sachs GQG Partners Intl Op A	524.06	\$17.32	\$9,076.79
GSIMX	Goldman Sachs GQG Partners Intl Op Fund	196.12	\$17.45	\$3,422.36
HD	Home Depot Inc	10.34	\$283.45	\$2,929.45
HON	Honeywell International	25.64	\$191.60	\$4,913.20
IJR	iShares Core S&P Small-Cap ETF	172.30	\$92.43	\$15,925.69
IVV	iShares Core S&P 500	109.09	\$419.43	\$45,756.04
JPM	JP Morgan Chase & Co.	31.20	\$135.71	\$4,233.74
LANSX	Lord Abbett Natl Tax-Free Income A	1573.36	\$10.29	\$16,189.90
MA	Mastercard Inc	15.11	\$365.02	\$5,515.83
MAR	Marriott Intl Inc Cl A	15.14	\$167.79	\$2,540.68
MCD	McDonald's Corporation	10.29	\$285.11	\$2,933.49
MMDA12	FDIC Insured Deposit Account	4693.62	\$1.00	\$4,693.62
MOOPX	Mercator International Opportunity A	956.51	\$10.11	\$9,670.36
MS	Morgan Stanley	4.18	\$81.76	\$341.35
MSFT	Microsoft Corp	20.25	\$328.39	\$6,648.91
MWTIX	Metropolitan West Total Return Bond I	916.65	\$9.15	\$8,387.37
MWTRX	Metropolitan West Total Return Bond	870.50	\$9.15	\$7,965.04
NEE	NextEra Energy Inc	66.78	\$73.46	\$4,905.88
PEP	Pepsico Incorporated	1.03	\$182.35	\$188.17
PIIVX	The Private Shares Fund I	704.80	\$40.56	\$28,586.48
ROBO	Robo Stox Global Robotics and Automation Index ETF	194.00	\$54.51	\$10,574.94
SCHG	Schwab US Large Cap Growth	262.57	\$70.28	\$18,453.42
SCPZX	Carillon Reams Core Plus Bond Instll	806.15	\$30.20	\$24,345.84
SHIEX	Forum Exceed Structured Shield Index Strat Inv	1008.32	\$8.53	\$8,600.98
SHIIX	Exceed Defined Shield Index I	288.77	\$8.60	\$2,483.38
TGT	Target Corporation	15.46	\$130.93	\$2,024.44

Joel Rudman Portfolio Positions as of 05/31/2023

Ticker	Description	Units	Price	5/31/23 Market Value
TMCASH100	TD Ameritrade Cash Fund	11.39	\$1.00	\$11.39
UNH	UnitedHealth Group Inc	10.16	\$487.24	\$4,949.86
UPS	United Parcel Service Inc	10.41	\$167.00	\$1,738.80
VTV	Vanguard Value ETF	33.20	\$134.77	\$4,474.50
VUG	Vanguard Growth ETF	20.04	\$265.06	\$5,310.74
VV	Vanguard Large-Cap Index Fund ETF	98.78	\$190.91	\$18,858.47
VWO	Vanguard FTSE Emerging Markets	155.11	\$39.05	\$6,057.01
WMT	Walmart Inc	25.60	\$146.87	\$3,760.46
ADANX	AQR Diversified Arbitrage N	288.75	\$11.64	\$3,361.10
DHEAX	Diamond Hill Short Duration Total Ret A	372.37	\$9.46	\$3,522.57
EFG	iShares MSCI EAFE Growth ETF	34.67	\$93.15	\$3,229.04
FSK	FS KKR Capital Corp	148.23	\$19.35	\$2,868.23
FVD	First Trust Value Line Dividend Index Fund	143.41	\$38.66	\$5,544.31
GSIH	Goldman Sachs GQG Partners Intl Op A	200.29	\$17.32	\$3,469.02
IDV	iShares International Select Dividend	238.41	\$26.23	\$6,253.45
IJR	iShares Core S&P Small-Cap ETF	52.52	\$92.43	\$4,854.51
IWB	iShares Russell 1000 ETF	80.88	\$229.06	\$18,525.70
MMDA12	FDIC Insured Deposit Account	438.16	\$1.00	\$438.16
MOOPX	Mercator International Opportunity A	283.77	\$10.11	\$2,868.87
MWTRX	Metropolitan West Total Return Bond	573.73	\$9.15	\$5,249.66
ROBO	Robo Stox Global Robotics and Automation Index ETF	62.00	\$54.51	\$3,379.62
SCHG	Schwab US Large Cap Growth	89.71	\$70.28	\$6,304.97
SCPYX	Carillion Ser Core Plus Bond Y	171.27	\$30.12	\$5,158.50
SCPZX	Carillon Reams Core Plus Bond Instll	296.94	\$30.20	\$8,967.72
SHIEX	Forum Exceed Structured Shield Index Strat Inv	162.20	\$8.53	\$1,383.52
SHIIX	Exceed Defined Shield Index I	256.69	\$8.60	\$2,207.53
TMCASH100	TD Ameritrade Cash Fund	7.41	\$1.00	\$7.41
VMBS	Vanguard Mortgage Backed Sec Indx ETF	108.09	\$46.21	\$4,994.61
VWO	Vanguard FTSE Emerging Markets	41.02	\$39.05	\$1,601.79
IEFA	iShares Core MSCI EAFE ETF	52.55	\$66.03	\$3,469.75
IJR	iShares Core S&P Small-Cap ETF	10.28	\$92.43	\$950.37
IWB	iShares Russell 1000 ETF	28.73	\$229.06	\$6,580.44
MMDA12	FDIC Insured Deposit Account	158.42	\$1.00	\$158.42
MWTRX	Metropolitan West Total Return Bond	359.10	\$9.15	\$3,285.75
SCPYX	Carillion Ser Core Plus Bond Y	55.32	\$30.12	\$1,666.08
VWO	Vanguard FTSE Emerging Markets	25.47	\$39.05	\$994.57
ADANX	AQR Diversified Arbitrage N	488.66	\$11.64	\$5,687.98
CORFX	Flat Rock Core Income Fund	1997.00	\$20.15	\$40,239.63
DHEAX	Diamond Hill Short Duration Total Ret A	561.30	\$9.46	\$5,309.85
DHEIX	Diamond Hill Short Duration Total Ret I	1306.29	\$9.46	\$12,357.50
EFG	iShares MSCI EAFE Growth ETF	131.73	\$93.15	\$12,270.65
FVD	First Trust Value Line Dividend Index Fund	623.88	\$38.66	\$24,119.05
GSIH	Goldman Sachs GQG Partners Intl Op A	452.63	\$17.32	\$7,839.56
IDV	iShares International Select Dividend	554.59	\$26.23	\$14,546.92
IJR	iShares Core S&P Small-Cap ETF	126.61	\$92.43	\$11,702.46
IWB	iShares Russell 1000 ETF	212.51	\$229.06	\$48,677.77
MMDA12	FDIC Insured Deposit Account	6678.57	\$1.00	\$6,678.57
MOOPX	Mercator International Opportunity A	547.68	\$10.11	\$5,537.08
MWTRX	Metropolitan West Total Return Bond	1187.16	\$9.15	\$10,862.48
ROBO	Robo Stox Global Robotics and Automation Index ETF	221.00	\$54.51	\$12,046.71
SCHG	Schwab US Large Cap Growth	196.67	\$70.28	\$13,821.96
SCPZX	Carillon Reams Core Plus Bond Instll	1169.34	\$30.20	\$35,313.95
SHIEX	Forum Exceed Structured Shield Index Strat Inv	690.33	\$8.53	\$5,888.50
SHIIX	Exceed Defined Shield Index I	581.70	\$8.60	\$5,002.58
VMBS	Vanguard Mortgage Backed Sec Indx ETF	298.12	\$46.21	\$13,776.08
VWO	Vanguard FTSE Emerging Markets	57.08	\$39.05	\$2,228.94