

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/26/2023

General Information

Name: Mrs Kimberly Sullivan Amontree

Address: 1117 San Mateo Dr, Punta Gorda, FL 33950

PID 268019

County: Charlotte

AGENCY INFORMATION

Organization	Suborganization	Title
Charlotte County Public Schools	Elected Constitutional Officer	Board Member - District 2

Net Worth

My Net Worth as of December 31, 2022 was \$ 3,216,971.00.

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 \$ 100,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
1117 San Mateo Drive Punta Gorda, FL 33950	\$ 1,632,380.00
2111 Wisconsin Ave #412 Washington D.C.	\$ 285,000.00
Bank of America	\$ 57,363.00
Centennial Bank	\$ 157,116.00
Suncoast Credit Union	\$ 7,481.00
Florida Prepaid Plan	\$ 1,500.00
401(k) Profit Sharing Plan (Fidelity)	\$ 718,644.00
Fidelity Investment Account	\$ 689,168.00
Ally Bank IRA	\$ 28,248.00
NY 529	\$ 122,117.00
Virginia 529	\$ 21,192.00
HSA Optum Bank	\$ 27,181.00

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
TD Bank	32 Chestnut St. Lewiston, ME 04243	\$ 516,921.00
First Home Mortgage	1 Corporate Drive STe 360 Lake Zurich,IL 60047	\$ 201,646.00

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
James S. Amontree, M.D. PA	2400 Harbor Blvd. #9 Port Charlotte, FL 33952	\$ 34,512.00
Independent Spin Instructor	1117 San Mateo Drive Punta Gorda FL 33950	\$ 1,620.00
Charlotte County Public Schools	1445 Education Way Port Charlotte, FL 33948	\$ 40,145.00
JKA Real Estate Holdings, LLC	2400 Harbor Blvd. #9 Port Charlotte, FL 33952	\$ 10,234.00
Fidelity Divident Income	PO Box 28019 Albuquerque, NM 87125	\$ 11,941.00

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.

Kimberly Sullivan Amontree

Digitally signed: 06/26/2023

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