

2022 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/28/2023

General Information

Name: Hon Ivonne Cuesta

CONFIDENTIAL

Address: Lawson E. Thomas Courthouse 175 NW 1st Ave RM. 2915, Miami, FL 33128

PID 67718

County: Miami-Dade

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (11Th)	Elected Constitutional Officer	Circuit Court Judge

Net Worth

My Net Worth as of June 28, 2023 was \$ 1,030,822.00.

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 \$ 15,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
See Attached		

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
State of Florida Salary	Dep. of Financial Services	\$ 182,000.00

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.

Ivonne Cuesta

Digitally signed: 06/28/2023

Filed with COE: 06/28/2023

Full and Public Disclosure of Financial Interest 2022

Part B- Assets

Single Family Home, [REDACTED] (FMV)	\$1,000,000
2022 Volvo XC 60, Estimated Value	\$34,500
Household Goods, Estimated Value	\$15,000
InterAmerican Bank	\$1425
InterAmerican Bank	\$5925
InterAmerican Bank	\$49,816
State of Florida Deferred Compensation 457	
Nationwide Retirement Solutions	
Cash	\$1174
Schwab PCRA	
Proctor and Gamble	\$5352
Johnson and Johnson	\$7558
3M	\$6704
Archer Daniels MIDLN	\$13,205
Deere & Co.	\$45,348
Home Depot, Inc.	\$23,052
Microsoft	\$25,978
Caterpillar	\$14,768
General Mills, Inc.	\$64
Alphabet, Inc.	\$2105
EMBC	\$78
Becton Dickinson	\$3870
NVIDIA Corp.	\$3697
Cash	\$186
Total	\$153,139
Custodial Account	
Cash	\$79
Colgate-Palmolive	\$159
General Mills, Inc.	\$171

Pepsico Inc.	\$192
Total	\$601
See Mutual Funds Account attached as a separate sheet	\$12,860

Part C- Liabilities in Excess of \$1,000

Nelnet P.O. Box 82561 Lincoln, NE 68501-2561	\$30,931
United Wholesale Mortgage P.O. Box 77404 Ewing, NJ 08628	\$211,229

Fund Name	# of Units	Unit Price	Fund Balance	% of Balance
BALANCED				
<u>7027 American Funds Am Balanced R6</u>	125.1687	\$10.091945	\$1,263.20	9.82%
LARGE CAP VALUE/BLEND				
<u>C975 Fidelity 500 Index Fund</u>	587.8394	\$13.532019	\$7,954.65	61.85%
<u>F633 Dodge & Cox Stock Fund X</u>	119.9730	\$10.241473	\$1,228.70	9.56%
SMALL/MID/SPECIALTY				
<u>C993 Fidelity Sm Cp Ind Fund</u>	95.1640	\$12.629585	\$1,201.88	9.35%
<u>D122 Fidelity Mid Cap Index Fd</u>	80.1096	\$15.128911	\$1,211.97	9.42%
Total			\$12,860.40	100.00%



Need Help?

Fidelity® 500 Index Fund

Release Date
03-31-23Category
Large Blend

Investment Objective & Strategy

From the investment's prospectus

The investment seeks to provide investment results that correspond to the total return performance of common stocks publicly traded in the United States.

The fund normally invests at least 80% of assets in common stocks included in the S&P 500® Index, which broadly represents the performance of common stocks publicly traded in the United States. It lends securities to earn income.

Past name(s) : Fidelity® 500 Index Institutional Prem.

Volatility and Risk

Volatility as of 03-31-23



Risk Measures as of 03-31-23	Port Avg	Ref S&P 500	Rel Cat
3 Yr Std Dev	19.22	1.00	1.01
3 Yr Beta	1.00	—	1.04

Principal Risks

Lending, Loss of Money, Not FDIC Insured, Index Correlation/Tracking Error, Issuer, Market/Market Volatility, Equity Securities, Passive Management

Important Information

Morningstar Investment Profiles must be accompanied by Morningstar Disclosure and Glossary.

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Portfolio Analysis

Composition as of 02-28-23



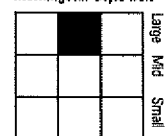
	% Assets
● U.S. Stocks	98.8
● Non-U.S. Stocks	1.1
● Bonds	0.0
● Cash	0.0
● Other	0.0

Top 10 Holdings as of 02-28-23

	% Assets
Apple Inc	6.62
Microsoft Corp	5.58
Amazon.com Inc	2.51
NVIDIA Corp	1.74
Tesla Inc	1.66
Berkshire Hathaway Inc Class B	1.65
Alphabet Inc Class A	1.62
Alphabet Inc Class C	1.44
Exxon Mobil Corp	1.36
UnitedHealth Group Inc	1.34

Morningstar Style Box™ as of 02-28-23

	% Mkt Cap
Giant	48.82
Large	35.01
Medium	16.03
Small	0.14
Micro	0.00



Morningstar Equity Sectors as of 02-28-23

	% Fund
↻ Cyclical	29.73
⚙ Basic Materials	2.51
🔄 Consumer Cyclical	10.46
🏦 Financial Services	13.98
🏠 Real Estate	2.78
⚡ Sensitive	45.90
📡 Communication Services	7.67
⚡ Energy	4.80
🏭 Industrials	8.71
💻 Technology	24.72
➡ Defensive	24.37
🛒 Consumer Defensive	7.13
🏥 Healthcare	14.42
🏠 Utilities	2.82

Operations

Gross Prosp Exp Ratio	0.02% of fund assets
Net Prosp Exp Ratio	0.02% of fund assets
Management Fee	0.02%
12b-1 Fee	—
Other Fee	—
Miscellaneous Fee(s)	0.00%
Fund Inception Date	05-04-11
Total Fund Assets (\$mil)	380,892.8
Annual Turnover Ratio %	2.00
Fund Family Name	Fidelity Investments

Waiver Data	Type	Exp. Date	%
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Portfolio Manager(s)

Louis Bottari. Since 2009.
Peter Matthew. Since 2012.

Advisor	Fidelity Management & Research Company LLC
Subadvisor	Geode Capital Management, LLC

Notes

American Funds® American Balanced Fund® - Class R-6

Release Date
03-31-23

Category

Allocation--50% to 70% Equity

Investment Objective & Strategy

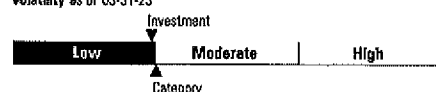
From the investment's prospectus

The investment seeks conservation of capital, current income and long-term growth of capital and income.

The fund uses a balanced approach to invest in a broad range of securities, including common stocks and investment-grade bonds. It also invests in securities issued and guaranteed by the U.S. government and by federal agencies and instrumentalities. In addition, the fund may invest a portion of its assets in common stocks, most of which have a history of paying dividends, bonds and other securities of issuers domiciled outside the United States.

Volatility and Risk

Volatility as of 03-31-23



Risk Measures as of 03-31-23	Port Avg	Rel S&P 500	Rel Cat
3 Yr Std Dev	12.44	0.65	0.96
3 Yr Beta	0.96	—	0.99

Principal Risks

Foreign Securities, Loss of Money, Not FDIC Insured, Growth Investing, Active Management, Income, Issuer, Market/Market Volatility, Mortgage-Backed and Asset-Backed Securities, Restricted/Illiquid Securities, U.S. Government Obligations, Fixed-Income Securities

Important Information

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Portfolio Analysis

Composition as of 03-31-23



	% Assets
● U.S. Stocks	51.5
● Non-U.S. Stocks	8.3
● Bonds	27.6
● Cash	8.2
● Other	4.4

Top 10 Holdings as of 03-31-23

	% Assets
Cap Grp Cent Fd Ser II	4.31
Microsoft Corp	3.98
Broadcom Inc	2.86
UnitedHealth Group Inc	2.10
Philip Morris International Inc	2.01
The Home Depot Inc	1.38
Pfizer Inc	1.18
Federal National Mortgage	1.17
Associat 4.5% 05-01-53	1.10
Alphabet Inc Class C	1.10
United States Treasury Bonds 3% 08-15-52	1.10

Credit Analysis: % Bonds as of 03-31-23

AAA	68	BB	0
AA	5	B	0
A	12	Below B	0
BBB	15	Not Rated	1

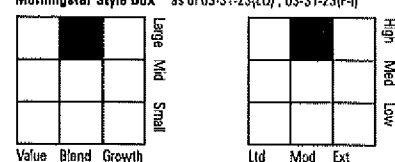
Operations

Gross Prosp Exp Ratio	0.25% of fund assets
Net Prosp Exp Ratio	0.25% of fund assets
Management Fee	0.21%
12b-1 Fee	—
Other Fee	0.00%
Miscellaneous Fee(s)	0.04%
Fund Inception Date	05-01-09
Total Fund Assets (\$mil)	196,302.3
Annual Turnover Ratio %	52.00
Fund Family Name	American Funds

Notes

Restated to reflect current fees.

Morningstar Style Box™ as of 03-31-23(F-1); 03-31-23(F-1)



Morningstar Super Sectors as of 03-31-23

	% Fund
↻ Cyclical	26.83
↗ Sensitive	44.01
→ Defensive	29.15

Morningstar F-1 Sectors as of 03-31-23

	% Fund
🏠 Government	23.67
🏢 Corporate	18.87
🏡 Securitized	33.76
🏘 Municipal	1.01
💰 Cash/Cash Equivalents	22.70
📦 Other	0.00

Valuer Data Type Exp. Date %

Portfolio Manager(s)

Hilda Applbaum, CFA. Since 1999.
Alan Berro, CFA. Since 2006.

Adviser Capital Research and Management Company
Subadvisor —

Dodge & Cox Stock Fund - Class X

Release Date
03-31-23Category
Large Value

Investment Objective & Strategy

From the investment's prospectus

The investment seeks long-term growth of principal and income; a secondary objective is to achieve a reasonable current income.

The fund invests primarily in a diversified portfolio of equity securities. It will invest at least 80% of its total assets in equity securities, including common stocks, depositary receipts evidencing ownership of common stocks, certain preferred stocks, securities convertible into common stocks, and securities that carry the right to buy common stocks. The fund may invest up to 20% of its total assets in U.S. dollar-denominated securities of non-U.S. issuers traded in the United States that are not in the S&P 500 Index.

Volatility and Risk

Volatility as of 03-31-23



Risk Measures as of 03-31-23	Port Avg	Rel S&P 500	Rel Cat
3 Yr Std Dev	—	—	—
3 Yr Beta	—	—	—

Principal Risks

Loss of Money, Not FDIC Insured, Market/Market Volatility, Equity Securities, Restricted/Illiquid Securities, Derivatives, Management

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Portfolio Analysis

Composition as of 12-31-22

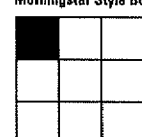


	% Assets
● U.S. Stocks	87.4
● Non-U.S. Stocks	11.2
● Bonds	0.0
● Cash	1.4
● Other	0.0

Top 10 Holdings as of 12-31-22

	% Assets
Charles Schwab Corp	4.87
Occidental Petroleum Corp	4.32
Wells Fargo & Co	3.71
Sanofi SA ADR	3.29
MetLife Inc	3.06
Cigna Corp	2.91
Fiserv Inc	2.66
Alphabet Inc Class C	2.63
Raytheon Technologies Corp	2.63
Capital One Financial Corp	2.48

Morningstar Style Box™ as of 12-31-22



Value Blend Growth

	% Mkt Cap
Giant	23.80
Large	54.00
Medium	19.91
Small	2.24
Micro	0.06

Morningstar Equity Sectors as of 12-31-22

	% Fund
↺ Cyclical	28.65
Basic Materials	1.52
Consumer Cyclical	3.09
Financial Services	23.77
Real Estate	0.27
↖ Sensitive	46.67
Communication Services	11.32
Energy	7.43
Industrials	10.41
Technology	17.51
→ Defensive	24.68
Consumer Defensive	2.31
Healthcare	22.37
Utilities	0.00

Operations

Gross Prosp Exp Ratio	0.46% of fund assets
Net Prosp Exp Ratio	0.41% of fund assets
Management Fee	0.45%
12b-1 Fee	—
Other Fee	0.00%
Miscellaneous Fee(s)	0.01%
Fund Inception Date	05-02-22
Total Fund Assets (\$mil)	89,074.2
Annual Turnover Ratio %	16.00
Fund Family Name	Dodge & Cox

Valuer Data	Type	Exp. Date	%
Expense Ratio	Contractual	04-30-23	0.05

Portfolio Manager(s)

David Hoelt, CFA. Since 2002.
Steven Voorhis, CFA. Since 2006.

Advisor	Dodge & Cox
Subadvisor	—

Notes

The "Other expenses" of Dodge & Cox Stock - Class I shares have been restated to reflect expenses expected to be incurred during the current fiscal year. The "Other expenses" of Dodge & Cox Stock - Class X shares have been estimated to reflect expenses expected to be incurred during the current fiscal year. Dodge & Cox has contractually agreed to reimburse the Fund for all ordinary expenses to the extent necessary to maintain Total Annual Fund Operating Expenses of the Dodge & Cox Stock - Class X at 0.41% until April 30, 2023. This agreement cannot be terminated prior to April 30, 2023 other than by resolution of the Fund's Board of Trustees. The term of the agreement renews annually unless terminated with 30 days' written notice by either party prior to the end of the term. The agreement does not permit Dodge & Cox to recoup any fees waived or payments made to the Fund for a prior year.

Fidelity® Small Cap Index Fund

Release Date
03-31-23Category
Small Blend

Investment Objective & Strategy

From the investment's prospectus

The investment seeks to provide investment results that correspond to the total return of stocks of small-capitalization United States companies.

The fund invests normally at least 80% of its assets in securities included in the Russell 2000® Index. It lends securities to earn income.

Past name(s) : Fidelity® Small Cap Index Instl Prem.

Volatility and Risk

Volatility as of 03-31-23



Risk Measures as of 03-31-23	Port Avg	Rel S&P 500	Rel Cat
3 Yr Std Dev	22.83	1.19	1.05
3 Yr Beta	1.02	—	1.04

Principal Risks

Lending, Loss of Money, Not FDIC Insured, Index Correlation/Tracking Error, Issuer, Market/Market Volatility, Equity Securities, Passive Management, Small Cap

Important Information

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Portfolio Analysis

Composition as of 01-31-23

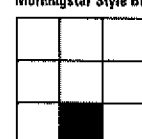


	% Assets
● U.S. Stocks	97.5
● Non-U.S. Stocks	1.7
● Bonds	0.1
● Cash	0.8
● Other	0.0

Top 10 Holdings as of 01-31-23

	% Assets
E-mini Russell 2000 Index Future Mar 2	0.95
Fidelity Revere Str Tr	0.75
Indium Communications Inc	0.30
Matador Resources Co	0.30
Crocs Inc	0.29
Saia Inc	0.29
EMCOR Group Inc	0.28
Inspire Medical Systems Inc	0.28
RBC Bearings Inc	0.28
Halozyme Therapeutics Inc	0.27

Morningstar Style Box™ as of 01-31-23



Value Blend Growth

	% Mkt Cap
Giant	0.00
Large	0.00
Medium	4.42
Small	61.11
Micro	34.47

Morningstar Equity Sectors as of 01-31-23

	% Fund
🔄 Cyclical	38.15
🏭 Basic Materials	4.33
🛒 Consumer Cyclical	10.80
🏦 Financial Services	15.26
🏠 Real Estate	7.76
📈 Sensitive	37.96
📡 Communication Services	2.60
⚡ Energy	6.43
🏭 Industrials	14.93
💻 Technology	14.00
➡ Defensive	23.89
🛒 Consumer Defensive	4.07
🏥 Healthcare	16.52
🔌 Utilities	3.30

Operations

Gross Prosp Exp Ratio	0.03% of fund assets
Net Prosp Exp Ratio	0.03% of fund assets
Management Fee	0.03%
12b-1 Fee	—
Other Fee	—
Miscellaneous Fee(s)	0.00%
Fund Inception Date	09-08-11
Total Fund Assets (\$mil)	19,872.6
Annual Turnover Ratio %	24.00
Fund Family Name	Fidelity Investments

Waiver Data	Type	Exp. Date	%
—	—	—	—

Portfolio Manager(s)

Louis Bottari. Since 2011.
Peter Matthew. Since 2012.

Advisor	Fidelity Management & Research Company LLC
Subadvisor	Geode Capital Management, LLC

Notes

Fidelity® Mid Cap Index FundRelease Date
03-31-23Category
Mid-Cap Blend**Investment Objective & Strategy**

From the investment's prospectus

The investment seeks to provide investment results that correspond to the total return of stocks of mid-capitalization United States companies.

The fund invests normally at least 80% of its assets in securities included in the Russell Midcap® Index. It lends securities to earn income.

Past name(s) : Fidelity® Mid Cap Index Instl Prem.

Volatility and Risk

Volatility as of 03-31-23



Risk Measures as of 03-31-23	Port Avg	Rel S&P 500	Rel Cat
3 Yr Std Dev	20.41	1.08	1.01
3 Yr Beta	1.01	—	1.05

Principal Risks

Lending, Loss of Money, Not FDIC Insured, Index Correlation/Tracking Error, Issuer, Market/Market Volatility, Equity Securities, Passive Management, Mid-Cap

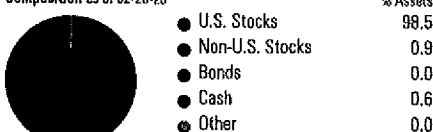
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Portfolio Analysis

Composition as of 02-28-23



Top 10 Holdings as of 02-28-23

	% Assets
Fidelity Revere Str Tr	0.56
Synopsis Inc	0.56
Cadence Design Systems Inc	0.53
O'Reilly Automotive Inc	0.52
Phillips 66	0.49
AutoZone Inc	0.48
Amphenol Corp Class A	0.46
Parker Hannifin Corp	0.46
Corteva Inc	0.45
Microchip Technology Inc	0.44

Morningstar Style Box™ as of 02-28-23

	% Mkt Cap
Value	0.00
Blend	16.92
Growth	73.14
Large	9.82
Mid	0.12
Small	
Micro	

Morningstar Equity Sectors as of 02-28-23

	% Fund
🔄 Cyclical	39.91
🏭 Basic Materials	5.20
🛒 Consumer Cyclical	12.96
🏦 Financial Services	13.85
🏠 Real Estate	7.90
🛡️ Sensitive	40.43
📡 Communication Services	3.55
⚡ Energy	4.89
🏭 Industrials	15.74
💻 Technology	16.25
➡️ Defensive	19.65
🛒 Consumer Defensive	3.83
🏥 Healthcare	10.47
🔌 Utilities	5.35

Operations

Gross Prosp Exp Ratio	0.03% of fund assets
Net Prosp Exp Ratio	0.03% of fund assets
Management Fee	0.03%
12b-1 Fee	—
Other Fee	—
Miscellaneous Fee(s)	0.00%
Fund Inception Date	09-08-11
Total Fund Assets (\$mil)	26,489.2
Annual Turnover Ratio %	12.00
Fund Family Name	Fidelity Investments

Waiver Data	Type	Exp. Date	%
—	—	—	—

Portfolio Manager(s)

Louis Bottari. Since 2011.
Peter Matthew. Since 2012.

Advisor	Fidelity Management & Research Company LLC
Subadvisor	Geode Capital Management, LLC

Notes