

General Information

Name: Ms Carol Jean Gillespie

PID 311337

AGENCY INFORMATION

Organization	Suborganization	Title
Lake Wales	Community Redevelopment Agency Board	Commissioner
Lake Wales	Mayor And City Commission	City Commissioner

Net WorthMy Net Worth as of December 31, 2023 was \$ 4,709,271.00.**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 \$ 12,887.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
5490 Treeflower Dr, Livermore, Calif.	\$ 757,800.00
Stock (Bank of America Corp)	\$ 7,609.00
Stock (Baxter International)	\$ 7,732.00

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Description of Asset	Value of Asset
Stock (Caterpillar Inc.)	\$ 29,567.00
Stock (Chesapeake Util Corp)	\$ 68,131.00
Stock (Chevron Corp)	\$ 51,908.00
Stock (Dominion Energy Inc)	\$ 18,800.00
Stock (Walt Disney Co.)	\$ 27,087.00
Stock (General Dynamics Corp)	\$ 51,934.00
Stock (PNC Financial Services)	\$ 15,485.00
Stock (Semptra)	\$ 35,870.00
Stock (Texas Instruments)	\$ 34,092.00
Stock (Exxon Mobil Corp)	\$ 37,493.00
Stock (Glaxo SmithKline PLC ADR)	\$ 14,824.00
Stock (Haleon PLC ADR)	\$ 4,115.00
Investment Product (Schwab US Broad Mkt ETF)	\$ 23,198.00
Investment Product (Vanguard Total World Stock ETF)	\$ 102,880.00
Investment Product (Vanguard Total Stock Market ETF)	\$ 355,830.00
Investment Product (Vanguard Large Cap ETF)	\$ 109,075.00
Mutual Fund (Schwab Tax-Free Bond)	\$ 24,381.00
Mutual Fund (Vanguard Inter-Term Tx-Ex)	\$ 15,473.00
Mutual Fund (Vanguard US Growth)	\$ 13,289.00
Mutual Fund (Allspring Short-Term Muni)	\$ 81,764.00
Bond (Citibank NTNL A)	\$ 73,182.00
Bond (Goldman Sachs Bank)	\$ 49,398.00
Investment Product (Schwab Value Advantage Money Mkt)	\$ 422,690.00
Mutual Fund (Neuberger Berman Focus Fund)	\$ 113,976.00
Mutual Fund (Fidelity Capital and Income)	\$ 54,400.00
Mutual Fund (Fidelity Total Market Index)	\$ 935,497.00
Mutual Fund (Fidelity International Index)	\$ 115,635.00
Mutual Fund (Vanguard Emerging Mkts Index)	\$ 30,533.00

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Description of Asset	Value of Asset
Mutual Fund (Vanguard Windsor II)	\$ 54,992.00
Mutual Fund (Vanguard US Growth)	\$ 82,655.00
Investment Product (Schwab US Small Cap ETF)	\$ 24,538.00
Mutual Fund (Schwab S&P 500 Index)	\$ 60,240.00
Mutual Fund (Vanguard Explorer)	\$ 29,550.00
Mutual Fund (Vanguard FTSA All-World Ex-US Index)	\$ 153,179.00
Mutual Fund (Vanguard Long-Term Tax Exempt)	\$ 16,589.00
Mutual Fund (Vanguard Total Stock Mkt Index)	\$ 504,543.00
Mutual Fund (Vanguard Tax-Managed Balanced Fund)	\$ 21,745.00
Bank Account (Wells Fargo Checking)	\$ 4,833.00
Bank Account (JPMorgan Chase Bank Checking)	\$ 39,584.00
Cash (Charles Schwab)	\$ 22,631.00

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

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

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. Or attach a complete copy of your 2023 federal income tax return, including all W2s, schedules, and attachments. Please redact any social security or account numbers before attaching your returns, as the law requires these documents be posted to the Commission's website.

☐ I elect to file a copy of my 2023 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
N/A		

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

Name of Business Entity	Name of Major Sources of Business' Income	Address of Source	Principal Business Activity of Source
N/A			

Interests in Specified Businesses**Business Entity # 1**

N/A

Training

This section applies only to a Constitutional or elected municipal officer, each of whom are required to complete annual ethics training pursuant to Section 112.3142, F.S.

- ☐ 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.

Carol Gillespie

Digitally signed: 05/07/2025

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