2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 02/07/2024

General Information

Name: Mr Charles J Wilson III

PID 80794

AGENCY INFORMATION

Organization	Suborganization	Title
Lake Placid	Community Redevelopment Agency	Town Council Member/CRA Board Member
Lake Placid	Mayor And Town Council	Council Member

CANDIDATE FOR

Position	Agency Name	Position sought or held
City, Town or Village (Commission or Council), Governing Board - Form 6	Town of Lake Placid	Town Council Member

Net Worth

My Net Worth as of December 31, 2023 was $ 4,305,807.00.

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:

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Description of Asset	Value of Asset
BANK ACCOUNTS (HEARTLAND NATIONAL BANK)	$ 55,000.00
BANK ACCOUNTS (MID FLORIDA CREDIT UNION)	$ 100,000.00
STOCK (HEARTLAND BANCSHARES INC)	$ 131,250.00
IRA BANK ACCOUNT (TD BANK)	$ 5,493.00
IRA STOCK (3M CO)	$ 10,932.00
IRA ETF (ABRDN BLMBRG ALL CM SG K)	$ 14,520.00
IRA ETF (ENERGY SELECT SECTOR)	$ 20,960.00
IRA ETF (INVESCO PHARMACEUTICALS)	$ 39,952.00
IRA ETF (INVESCO PREFERRED ETF)	$ 12,043.00
IRA ETF (ISHARES US)	$ 43,301.00
IRA ETF (PROSHARES ONLINE RETAIL)	$ 2,705.00
IRA ETF (SELECT SECTOR HEALTH)	$ 23,867.00
IRA ETF (SELECT SECTOR UTI SELECT)	$ 27,549.00
IRA ETF (SPDR FUND CONSUMER)	$ 46,459.00
IRA ETF (SPDR S&P REGIONAL)	$ 6,554.00
IRA ETF (TECHNOLOGY SELECT SECTOR)	$ 19,248.00
REAL PROPERTY-HOME-763 SUNSET POINTE DR, LAKE PLACID, FL 33852	$ 650,000.00
REAL PROPERTY-POST GROVE (30A) 8925 CR 17 S, SEBRING, FL 33876	$ 375,000.00
REAL PROPERTY-HINTON GROVE (40A) 11400 PAYNE RD, SEBRING, FL 33875	$ 500,000.00
REAL PROPERTY-CREWS GROVE (18.5A) 131 OLD SR 8, VENUS, FL 33960	$ 277,500.00
REAL PROPERTY-COMMERCIAL RENTAL 140 HOLMES AVE, LAKE PLACID, FL 33852	$ 850,000.00
STOCK (SUNRIDGE HARVESTING CO)	$ 1,000,000.00

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Liabilities

LIABILITIES IN EXCESS OF $1,000:

Name of Creditor	Address of Creditor	Amount of Liability
HEARTLAND NATIONAL BANK	600 US HWY 27 N, LAKE PLACID, FL 33852	$ 64,733.00
WELLS FARGO AUTO	P O BOX 5265, SIOUX FALLS, SD 57117	$ 41,793.00

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

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

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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
SUNRIDGE HARVESTING CO	P O BOX 2290, LAKE PLACID, FL 33862	$ 307,000.00
TOWN OF LAKE PLACID	1069 US HWY 27 N, LAKE PLACID, FL 33852	$ 1,200.00
HEARTLAND BANCSHARES INC	320 US HWY 27 N, SEBRING, FL 33870	$ 2,250.00
FARM CREDIT OF FLORIDA, ACA	11903 SOUTHERN BLVD STE 200, WEST PALM BEACH, FL 33411	$ 1,489.00
U S DEPT OF AGRICULTURE	450 HWY 98 N, OKEECHOBEE, FL 34972	$ 100,456.00
GREAT AMERICAN INSURANCE COMPANY	301 EAST 4TH ST 16NE, CINCINNATI, OH 45202	$ 88,028.00
CUTRALE CITRUS JUICES USA	602 MCKEAN STREET, AUBURNDALE, FL 33823	$ 24,482.00

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
SUNRIDGE HARVESTING CO	PAI GROVES LLC	201 S ORANGE AVE, SUITE 795, ORLANDO, FL 32801	CITRUS GROWER
SUNRIDGE HARVESTING CO	CUTRALE CITRUS JUICES USA	602 MCKEAN STREET, AUBURNDALE, FL 33823	CITRUS GROWER

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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.

CPA/Attorney Signature Only

If a certified public accountant licensed under Chapter 473, or attorney in good standing with the Florida Bar prepared this form for you, he or she must complete the following statement:

I, **LISA SHERMAN** prepared the CE Form 6 in accordance with Art. II, Sec. 8, Florida Constitution, Section 112.3144, Florida Statutes, and the instructions to the form. Upon my reasonable knowledge and belief, the disclosure herein is true and correct.

LISA SHERMAN

Digitally signed: **02/07/2024**

Filed with COE: 02/07/2024

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.

Charles J Wilson III

Digitally signed: **02/07/2024**

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