# 2023 Form 6 - Full and Public Disclosure of Financial Interests

**Filed with COE: 04/18/2025**

## General Information

Name: Ms Joy Gaestel Eberhardt

**PID 314119**

**AGENCY INFORMATION**

| Organization | Suborganization | Title |
|---|---|---|
| Lake Placid | Mayor And Town Council | |

## Net Worth

My Net Worth as of December 31, 2023 was $ 17,081,259.00.

## 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 $ 300,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER $1,000:

| Description of Asset | Value of Asset |
|---|---|
| Real Property - Home - 716 Sunset Pointe Drive, Lake Placid, FL | $ 1,680,000.00 |
| Real Property - Rental -117 Country Club Dr. #802, Lake Placid, FL Lake Placid, FL | $ 145,000.00 |
| Real Property - Rental - 117 Country Club Dr, #602, Lake Placid, FL | $ 140,000.00 |

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| Description of Asset | Value of Asset |
|---|---|
| Real Property - Rental - 18 Indigo Dr, Lake Placid, FL | $ 270,000.00 |
| Real Property - Rental - 2123 Hwy 42, Manitowoc, WI 54220 | $ 172,000.00 |
| Real Property - Land - 113 acres adjacent to 2123 Hwy 42, Manitowoc, Wi 5422 | $ 13,300,000.00 |
| Bank Accounts - Associated Bank - Green Bay Wi | $ 49,842.55 |
| Bank Accounts - Crews Bank and Trust - Lake Placid | $ 49,121.93 |
| Stock - Wisconsin Energy - 5,626 shares | $ 473,540.42 |
| Stock - Pioneer Natural Resources - 67 shares | $ 15,066.96 |
| FID SM Cap | $ 9,017.51 |
| FID Mid Cap Idx | $ 5,120.79 |
| FID LPS Pool Class A | $ 12,420.11 |
| FID 500 Index | $ 46,657.42 |
| FID GR Co Pool CL F | $ 56,451.68 |
| MFS Value R6 | $ 23,931.77 |
| WEC Common Stk ESOP | $ 4,126.01 |
| Brif | $ 28,916.12 |
| FID Balanced K 4 | $ 12,952.14 |
| FIDELITY SMALL CAP INDEX FUND (FSSNX) | $ 4,511.01 |
| FED HERMES MDT SMALL CAP CORE IS (QISCX) | $ 5,029.01 |
| ICHOR HOLDINGS SHS (ICHR) | $ 1,345.20 |
| ALLY FINANCIAL INC COM USD0.01 (ALLY) | $ 2,444.40 |
| AMAZON.COM INC (AMZN) | $ 3,038.80 |
| APPLIED MATERIALS INC (AMAT) | $ 1,782.77 |
| ARISTA NETWORKS INC (ANET) | $ 3,768.16 |
| BOEING CO (BA) | $ 2,085.28 |
| BROADCOM INC COM (AVGO) | $ 3,348.75 |
| AZENTA INC COM (AZTA) | $ 2,084.48 |
| CALIX INC (CALX) | $ 1,092.25 |
| CELSIUS HLDGS INC COM NEW (CELH) | $ 1,635.60 |

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| Description of Asset | Value of Asset |
|---|---|
| COHU INC (COHU) | $ 1,769.50 |
| ENTERGY CORP (ETR) | $ 1,011.90 |
| EPAM SYS INC COM USD0.001 (EPAM) | $ 5,054.78 |
| FEDEX CORP COM USD0.10 (FDX) | $ 1,011.88 |
| FORMFACTOR INC (FORM) | $ 3,128.25 |
| GENERAC HLDGS INC (GNRC) | $ 3,101.76 |
| HOME DEPOT INC (HD) | $ 4,505.15 |
| HONEYWELL INTER INC COM USD1 (HON) | $ 3,145.65 |
| IDEXX LABORATORIES INC COM (IDXX) | $ 3,885.35 |
| INTUITIVE SURGICAL INC (ISRG) | $ 5,060.40 |
| KLA CORP COM NEW (KLAC) | $ 2,325.20 |
| LAM RESEARCH CORP COM (LRCX) | $ 6,266.08 |
| LOWES COMPANIES INC COM USD0.50 (LOW) | $ 2,225.50 |
| MKS INSTRS INC COM (MKSI) | $ 5,863.59 |
| MASTERCARD INCORPORATED CL A (MA) | $ 5,544.63 |
| MICRON TECHNOLOGY INC (MU) | $ 5,547.10 |
| MYOMO INC COM NEW (MYO) | $ 1,302.60 |
| NETAPP INC (NTAP) | $ 1,322.40 |
| NEXTERA ENERGY INC COM (NEE) | $ 2,733.30 |
| NVIDIA CORPORATION COM (NVDA) | $ 26,741.88 |
| PAYPAL HLDGS INC COM (PYPL) | $ 1,596.66 |
| PINTEREST INC CL A (PINS) | $ 2,222.40 |
| PIONEER NATURAL RESOURCES (PXD) | $ 3,373.20 |
| RTX CORPORATION COM USD1.00 (RTX) | $ 4,207.00 |
| ROKU INC COM CL A (ROKU) | $ 2,291.50 |
| SOFI TECHNOLOGIES INC COM (SOFI) | $ 2,487.50 |
| TRANSDIGM GROUP INC (TDG) | $ 5,058.00 |
| ULTRA CLEAN HOLDINGS INC (UCTT) | $ 3,072.60 |
| UNITED PARCEL SERVICE INC CL B (UPS) | $ 1,572.30 |

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| Description of Asset | Value of Asset |
|---|---|
| Fidelity Money Market in IRA | $ 8,685.76 |
| Fidelity Money Market Trust A | $ 119,505.84 |
| FIDELITY SMALL CAP INDEX FUND (FSSNX) | $ 10,409.80 |
| FIDELITY LOW PRICED STOCK (FLPSX) | $ 11,177.69 |
| FIDELITY BLUE CHIP GROWTH (FBGRX) | $ 4,301.43 |
| JOHNSON CONTROLS INTERNATIONAL PLC | $ 1,210.44 |
| MEDTRONIC PLC (MDT) | $ 1,647.60 |
| ALLIANT ENERGY CORP COM USD0.01 (LNT) | $ 1,282.50 |
| ALLY FINANCIAL INC COM (ALLY) | $ 2,619.00 |
| AMAZON.COM INC (AMZN) | $ 1,519.40 |
| AMERICAN EXPRESS CO COM USD0.20 (AXP) | $ 1,873.40 |
| APPLIED MATERIALS INC COM USD0.01 (AMAT) | $ 4,051.75 |
| ARISTA NETWORKS INC COM USD0.0001 (ANET) | $ 12,246.52 |
| BLACKSTONE LONG SHORT CR INCOM | $ 2,862.50 |
| BOEING CO (BA) | $ 4,952.54 |
| BROADCOM INC COM (AVGO) | $ 25,673.75 |
| CISCO SYSTEMS INC (CSCO) | $ 3,031.20 |
| ENTERGY CORP (ETR | $ 1,011.90 |
| HOME DEPOT INC (HD) | $ 9,010.30 |
| HONEYWELL INTERNATIONAL (HON) | $ 2,306.81 |
| LAM RESEARCH CORP (LRCX) | $ 4,699.56 |
| LOCKHEED MARTIN (LMT) | $ 9,064.80 |
| MCDONALD S CORP (MCD) | $ 1,482.55 |
| MICROSOFT CORP (MSFT) | $ 1,128.12 |
| NEXTERA ENERGY INC COM USD0.01 (NEE) | $ 8,625.08 |
| NORTHROP GRUMMAN (NOC) | $ 2,340.70 |
| NVIDIA CORPORATION COM (NVDA) | $ 7,923.52 |
| OSHKOSH CORP (OSK) | $ 1,084.10 |
| TEXAS INSTRUMENTS (TXN) | $ 5,966.10 |

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| Description of Asset | Value of Asset |
|---|---|
| UNITED PARCEL SERVICE INC CL B (UPS) | $ 3,144.60 |
| WEC ENERGY GROUP INC COM (WEC) | $ 4,797.69 |
| Fidelity Money Market Trust B | $ 103,921.33 |
| Fidelity Money Market Trust C | $ 36,298.01 |
| Schwab acct A -NEXTERA ENERGY INC (NEE) | $ 11,358.62 |
| Schwab acct B - cash | $ 6,167.55 |
| ACADIA PHARMA (ACAD) | $ 1,565.50 |
| ADOBE (ADBE) | $ 4,176.20 |
| AMER ELEC POWER (AEP) | $ 1,186.22 |
| American Express (AXP) | $ 1,899.81 |
| Arista Networks (ANET) | $ 14,130.60 |
| Azenta (AZTA) | $ 1,693.64 |
| Broadcom (AVGO) | $ 3,348.75 |
| Cisco Systems (CSCO) | $ 2,738.64 |
| Duke Energy (DUK) | $ 1,215.72 |
| Formfactor (FORM) | $ 2,377.47 |
| Generac (GNRC) | $ 2,326.32 |
| Home Depoit (HD) | $ 1,784.73 |
| Honywell Intn. (HON) | $ 1,887.39 |
| Intuitive Surgical (ISRG) | $ 4,048.32 |
| Lam Research (LRCX) | $ 7,832.60 |
| Manhattan Bridge (LOAN) | $ 1,801.47 |
| Mastercard (MA) | $ 3,850.11 |
| Micron Technology (MU) | $ 4,181.66 |
| Microsoft (MSFT) | $ 3,834.48 |
| MKS Instrumenats (MKSI) | $ 4,432.77 |
| Netapp (NTAP) | $ 2,301.33 |
| Nextera Energy (NEE) | $ 2,614.74 |
| NVIDIA (NVDA) | $ 11,918.95 |

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| Description of Asset | Value of Asset |
|---|---|
| Onto Innovation (ONTO) | $ 10,703.00 |
| Pay Pal (PYPL) | $ 1,412.43 |
| Sony (SONY) | $ 2,854.52 |
| Texas Instruments (TXN) | $ 1,375.27 |
| Ultra Clean Holdings (UCTT) | $ 1,024.20 |
| WEC Energy (WEC) | $ 1,400.84 |
| Jhancock Blue (OPGIX) | $ 1,767.03 |
| JPMorgan Large Cap (OLGAX) | $ 2,401.02 |
| MorganStanley Inst Growth (MSEGX) | $ 2,167.21 |
| Primecap Odyssey Growth (POGRX) | $ 3,277.98 |
| T. Rowe Price Blue Chip (TRBCX) | $ 1,832.55 |

## 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 | | |

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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 |
|---|---|---|
| Rental | 18 Indigo Drive, Lake Placid, FL | $ 29,700.00 |
| Rental | 117 Country Club Dr #802, Lake Placid, FL | $ 20,700.00 |
| Rental | 117 Country Club Dr, #602, Lake Placid, FL | $ 18,300.00 |
| Rental - land | 2123 Hwy 42 Manitowoc, WI | $ 14,670.00 |
| Rental - house | 2123 Hwy 42 Manitowoc, WI | $ 6,000.00 |
| Pension Wisconsin Energy/Fidelity Investments | 100 Magellan Way, Covington, KY | $ 1,257.00 |
| Pension Wisconsin Energy/Fidelity Investments | 100 Magellan Way, Covington, KY | $ 18,347.00 |
| Social Security | US. Gov | $ 35,194.00 |
| Dividend Fidelity acct A Money Market | NATIONAL FINANCIAL SERVICES LLC 499 WASHINGTON BLVD JERSEY CITY, NJ 0731 | $ 5,225.82 |
| Dividend Fidelity Acct B Money Market | NATIONAL FINANCIAL SERVICES LLC 499 WASHINGTON BLVD JERSEY CITY, NJ 0731 | $ 4,021.33 |
| Dividend - Wisconsin Energy 5626 shares | Computershare, PO Box 43006, Providence RI, 02940 | $ 17,899.44 |

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 | | | |

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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.

## 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.

***Joy Gaestel Eberhardt***

Digitally signed: **02/14/2024**

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