

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 02/14/2024

General Information

Name: Jodi Wilkeson

PID 80549

AGENCY INFORMATION

Organization	Suborganization	Title
Zephyrhills	Mayor And City Council	Council Member Seat 3

CANDIDATE FOR

Position	Agency Name	Position sought or held
City, Town or Village (Commission or Council), Governing Board - Form 6	City of Zephyrhills	Seat 3

Net Worth

My Net Worth as of December 31, 2023 was \$ 1,646,037.00.

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 \$ 117,113.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Rental Duplex Property: 38501 12th Avenue & 5812 11th Street, Zephyrhills, FL 33542	\$ 233,215.00
Rental Duplex Property: 5652 & 5700 18th Street, Zephyrhills, FL 33542	\$ 200,781.00
Single Family Rental with MIL Apt: 5821/5819 18th Street, Zephyrhills, FL 33542	\$ 327,784.00
Single Family Home: 38501 11th Ave, Zephyrhills, FL 33542	\$ 299,828.00
Homestead: 5816 18th Street, Zephyrhills, FL 33542	\$ 204,509.00
State Farm Universal Whole Life Insurance Policy Cash Value: P.O. Box 2364, Bloomington, IL 61702-2364	\$ 16,153.00
1/75th Ownership Interest, Camp 'N' Water Campground Association, Inc: 11465 W Priest Lane, Homosassa Springs, FL 34448-4340	\$ 78,000.00
Wells Fargo Bank, N.A., P.O. Box 6995, Portland, OR 97228 -6995: Checking, Money Market & Platinum Savings Accounts	\$ 76,762.00
Bank OZK, P.O. Box 196, Ozark, AR 72949: Savings Accounts	\$ 18,572.00
San Antonio Citizens Federal Credit Union, 12542 Curley St, San Antonio, FL 33576-7038: Savings, Money Market & CD Accounts	\$ 73,770.00
Southstate Bank, P.O. Box 9602, Winter Haven, FL 33883: Savings Account	\$ 3,710.00

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Wells Fargo Bank, N.A. HELOC	P. O. Box 10378	\$ 4,160.00

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

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

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 02/14/2024

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
WDA Design Group, Incorporated	16057 Tampa Palms Blvd West #160, Tampa, FL 33647	\$ 79,316.70
S&W Empire Trust (Revocable Real Estate Trustee)	5816 18th Street, Zephyrhills, FL 33542	\$ 70,740.00

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
WDA Design Group, Incorporated	Brookwood SFL I LLC	138 Conant St, Beverly, MA 01915	Real Estate Holding Company
WDA Design Group, Incorporated	CLG360 LLC	8606 Hunters Village Rd #501, Tampa, FL 33647	Real Estate Holding Company
WDA Design Group, Inc	Orthopaedic Solutions Management LLC	13020 N. Telecom Parkway, Tampa, FL 33617	Physicians Management Services Organization
WDA Design Group	Pasadena Medical Plaza SSJ, LTD	3310 West End Avenue, Suite 700, Nashville, TN 37203	Real Estate Holding Company
WDA Design Group, Incorporated	University Medical Service Association, Inc	USF Health Services Center, 12901 Bruce B Downs Blvd, MDC Box 62, Tampa, FL 33612	Nonprofit Healthcare Practice Administration Services Organization
WDA Design Group, Inc	Eastbourne Investments LTD	300 International Drive, Suite 100, Williamsville, NY 14221	Real Estate Holding Company
See Attached			

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

Name of Business Entity	S&W Empire Trust
Address of Business Entity	5816 18th Street, Zephyrhills, FL 33542
Principal Business Activity	Revocable Real Estate Trust
Postion Held with Entity	Trustee
I own more than a 5% Interest in the Business	Yes
Nature of my Ownership Interest	50% Ownership

Business Entity # 2

Name of Business Entity	WDA Design Group, Inc
Address of Business Entity	16057 Tampa Palms Blvd West #160, Tampa, FL 33542
Principal Business Activity	Architecture & Interior Design Firm
Postion Held with Entity	President/Founder
I own more than a 5% Interest in the Business	Yes
Nature of my Ownership Interest	100% Owner (Shareholder)

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.

Jodi Wilkeson

Digitally signed: 02/14/2024

Filed with COE: 02/14/2024

Jodi Wilkeson, Councilwoman, City of Zephyrhills
Form 6 Secondary Income Report Attachment

S&W Empire Trust
(Revocable Real Estate Trust)
December 31, 2023

38501 12th Ave/5216 11th St, Zephyrhills, FL 33542 (Duplex apartment)

Tenants: Tony Coy
Kenneth Scott

5652/5700 18th St, Zephyrhills, FL 33542 (Duplex apartment)

Tenants: Jonathan & Mikaela Casarez
Sandra McNabb

5821/5819 18th St Zephyrhills, FL 33542 (Single Family Home w/MIL Apartment)

Tenants: Amanda Best/Rian Kerney