

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 04/29/2024

General Information

Name: Sen Jonathan Martin

PID 220453

AGENCY INFORMATION

Organization	Suborganization	Title
Senate	Elected Constitutional Officer	State Senator, District 33

CANDIDATE FOR

Position	Agency Name	Position sought or held
State Senate	Florida Senate	Senator

Net Worth

My Net Worth as of December 31, 2023 was \$ 1,210,000.00.

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:

Description of Asset	Value of Asset
Residence (Address Exempted pursuant to F.S. 119)	\$ 900,000.00
Residence (Address Exempted pursuant to F.S. 119)	\$ 400,000.00
Cogent Bank Stock	\$ 15,000.00
Fidelity Brokerage Account (each investment product under \$1,000)	\$ 1,504.22
FRS U.S. Stock Fund (340)	\$ 1,425.61
FRS Rtrmt 2045	\$ 4,512.37
American Funds AMCAP R3 (30)	\$ 32,138.73
American Funds Trgt Date Ret 2045 R3 (20)	\$ 21,079.90
American Funds Global Growth Port R3 (30)	\$ 31,372.86
American Funds New Economy R3 (20)	\$ 21,262.32
JPMorgan Large Cap Growth	\$ 5,063.30
Dodge & Cox Stock Investor Fund	\$ 5,018.23
Janus Henderson Triton N	\$ 1,772.48
DFA U.S. Targeted Value Port	\$ 1,761.82
Fidelity Global exUS Index	\$ 1,671.82
TIAA-CREF Intl Eq IDx Instl	\$ 1,673.74
Suncoast Credit Union Checking	\$ 30,638.78
Suncoast Credit Union Savings	\$ 52,364.29
Thomasville National Bank Checking	\$ 14,044.39
Diplomat RV & Boat Storage, LLC	\$ 313,462.00

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Penny Mac (Residence Mortgage)	PO Box 514387, Los Angeles, CA 90051	\$ 438,955.60
Thomasville Bank (Residence Mortgage)	301 North Broad Street, Thomasville, GA 31792	\$ 383,219.71
Navient (Student Loans)	PO Box 9500 Wilkes-Barre, PA 18773	\$ 37,484.82
Suncoast Credit Union (Auto Loan)	PO Box 11904, Tampa, FL 33680	\$ 17,815.08

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
Aloia Roland Lubell & Morgan PLLC	2222 Second Street, Fort Myers, FL 33901	\$ 357,091.98
State of Florida	200 E Gaines Street, Tallahassee, FL 32399	\$ 29,697.00
Diplomat RV & Boat Storage, LLC	2900 Diplomat Parkway East, Cape Coral, Florida 33909	\$ 24,400.00
Parvey & Cavenago Attorneys, PA	12711 World Plaza Lane, Fort Myers, FL 33907	\$ 18,380.23
Bevan & Associates LPA, Inc.	6555 Dean Memorial Parkway, Hudson, OH 44236	\$ 4,993.61

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.

Jonathan Martin

Digitally signed: 04/29/2024

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