

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 03/17/2024

General Information

Name: Mr Kevin Joseph Roberts

PID 288042

AGENCY INFORMATION

Organization	Suborganization	Title
CareerSource Heartland; Region 19	Board of Directors	Commissioner
Highlands County	Elected Constitutional Officer	Commissioner

Net Worth

My Net Worth as of December 31, 2023 was \$ 1,448,955.00.

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 \$ 95,400.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Home at 1155 S Hickory Trail, Avon Park, FL	\$ 317,300.00
Home at 229 Robin Ave., Sebring, FL	\$ 247,700.00
Independent Realty Trust NQ- Schwab Financial	\$ 25,452.00
CNL Healthcare REIT, Schwab Financial	\$ 14,928.00
IRA:Cash, Ishares, Main, Vanguard- Schwab Financial	\$ 367,105.00
Roth: Cash, Vanguard- Schwab Financial	\$ 102,277.00
ROTH IRA: Wife: Cash, Vanguard- Schwab Financial	\$ 88,214.00
IRA: Wife: Cash, Vanguard- Schwab Financial	\$ 91,241.00
Prospect Capital Preferred Stock at Pershing- Schwab Financial	\$ 20,000.00
FSK- FS KKR CAP NQ - Schwab Financial	\$ 42,588.00
Wells Fargo Bank - Crown Checking	\$ 27,755.00
Wells Fargo Bank - Save As You Go	\$ 18,367.00
Bank of America - Checking	\$ 50,099.00
Heartland National Bank - Sebring, FL	\$ 12,035.00
Heartland National Bank - Wife	\$ 1,013.00
Wells Fargo Bank Savings	\$ 1,355.00
Emigrant Direct Savings	\$ 21,462.00

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
Social Security - Kevin and Wife	6401 Security Blvd., Baltimore, MD	\$ 51,796.00
Highlands County Commissioner	600 S Commerce Ave., Sebring, FL	\$ 65,483.00
FRS Pension	1801 Hermitage Blvd., Suite 100, Tallahassee, FL	\$ 43,352.00
Rental Income - 229 Robin Ave.	229 Robin Ave., Sebring, FL	\$ 6,600.00

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
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.

Kevin Joseph Roberts

Digitally signed: 03/17/2024

Filed with COE: 03/17/2024