

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 04/10/2024

General Information

Name: Hon Lisa Sharon Walsh

CONFIDENTIAL

PID 10629

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (11Th)	Elected Constitutional Officer	Circuit Court Judge

CANDIDATE FOR

Position	Agency Name	Position sought or held
Circuit Judge	11th Judicial Circuit	Circuit Court Judge Seat 36

Net Worth

My Net Worth as of December 31, 2023 was \$ 3,591,356.99.

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 \$ 25,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Residence	\$ 2,150,000.00
Bank of America Checking	\$ 105,320.02
Bank of America Savings	\$ 1,546.00
Fidelity Investments (see attached)	\$ 1,270,478.73
State of FL Deferred Compensation (see attached)	\$ 271,228.40
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
JP Morgan Chase Bank	700 Kansas Ln Monroe LA 71203	\$ 195,029.96
JP Morgan Chase Bank (HELOC)	700 Kansas Ln Monroe LA 71203	\$ 29,885.82
Audi Financial Services	PO Box 5215 Carol Stream IL 60197	\$ 7,300.48

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
State of Florida	200 E Gaines St. Tallahassee FL 32399	\$ 186,611.52
St. Thomas University	16401 NW 37th Ave. Miami Gardens FL 33054	\$ 4,000.00
Fidelity Gov. Money Market (SPAXX) dividends	N/A	\$ 20,824.28
Fidelity Mun. Money Market (FTEXX) dividends	N/A	\$ 6,339.46
Nuveen HY Muni (NYMAX) dividends	N/A	\$ 1,255.31
Janus Henderson Triton (JATTX) dividends	N/A	\$ 2,941.43
Royce SM-Cap Opportunity (RYOFX) dividends	N/A	\$ 1,110.99
Janus Henderson Triton (JATTX) sale	N/A	\$ 2,869.33
Fidelity Int'l Discovery (FIGRX) sale	N/A	\$ 1,660.43

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

Based on the office or position you hold, the certification of training required under Section 112.3142, F.S., is not applicable to you 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.

Lisa Sharon Walsh

Digitally signed: **04/10/2024**

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Fidelity Investments:

FIDELITY GOVERNMENT MONEY MARKET (SPAXX)	\$ 291,347.52
FIDELITY SUSTAINABILITY INDEX FUND (FITLX)	\$ 53,062.66
FIDELITY LG CAP GR INDEX FUND (FSPGX)	\$ 49,814.26
FIDELITY BLUE CHIP GROWTH (FBGRX)	\$ 59,702.26
BNY MELLON LG CAP SEC FUND (DREVM)	\$ 49,969.34
COLUMBIA SM CAP VAL I FUND (CSMIX)	\$ 59,334.41
FMI INTERNATIONAL (FMIJX)	\$ 39,964.64
OAKMARK FUND INV CLASS (OAKMX)	\$ 29,887.24
NEUBERGER BERMAN GENESIS TRUST (NBGEX)	\$ 39,569.96
CONGRESS SM CAP GR RETAIL CLASS (CSMVX)	\$ 44,318.38
HARTFORD SCHRODERS INT'L STOCK (SCVEX)	\$ 16,697.21
AXS THOMAS REUTERS VENTURE CAPTL INDEX (LDVIX)	\$ 17,391.91
PARNASSUS VALUE EQUITY INVESTOR (PARWX)	\$ 61,136.36
ROYCE SM CAP OPPORTUNITY SVCS (RYOFX)	\$ 28,110.23
FIDELITY CAPITY & INCOME (FAGIX)	\$ 24,993.39
INVESCO AMT FREE MUNICIPAL A (OPTAX)	\$ 50,000.00
FROST CREDIT FUND INVESTOR (FCFAX)	\$ 9,989.16
NUVEEN HIGH YIELD MUNI CLASS A (NHMAX)	\$ 20,974.24
FIDELITY MUNICIPAL MONEY MARKET (FTEXX)	\$ 200,418.14
FIDELITY ENHANCED LG CAP VALUE ETF (FELV)	\$ 21,683.22
AMAZON.COM INC. (AMZN)	\$ 30,388.00
CELESTICA INC (CLS)	\$ 14,640.00
HUBSPOT INC (HUBS)	\$ 11,610.80
IQVIA HLDINGS INC (IQV)	\$ 4,627.60
SERVICENOW INC. (NOW)	\$ 14,129.80
SHAKE SHACK INC. (SHAK)	\$ 14,824.00
TRINET GROUP INC. (TNET)	\$ 11,893.00
	\$1,270,478.73

State of Florida Deferred Compensation Plan:

Vanguard Real Est Indx	\$	8,172.76
TRowePr SmCap Val Eq D	\$	2,737.46
Wasatch SMCap Gr Inst	\$	2,754.88
AmFds New Wld R6	\$	10,922.52
TRowePr Overseas St	\$	24,756.65
Vngrd Ttl IntlStkIndx	\$	16,512.20
JPM MdCap Val R6	\$	5,419.14
TRowePr US MdCap Gr Eq D	\$	5,436.69
Fid Contra	\$	10,787.26
TrowePr Divd Gr I	\$	18,952.98
TRowePr Eq Inc B	\$	24,409.09
TRowePr Gr Stk	\$	13,450.26
Vngrd Inst Indx Inst Pls	\$	13,502.49
DodgeCox	\$	56,787.21
AmFds Emrg Mkt Bd R6	\$	10,854.54
TRowePr Spctrm Inc	\$	13,542.00
Cash	\$	32,230.38
	\$	271,228.40