2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/27/2024

General Information

Name: Joe A Carlucci II

PID 306037

AGENCY INFORMATION

Organization	Suborganization	Title
Jacksonville	Council & Constitutional Officers	City Council District 5
Jacksonville	Jacksonville International Airport Area Redevelopment Agency	Board Member
Jacksonville	Renew Arlington Community Redevelopment Area	Board Member
Jacksonville	Soutel/Moncrief Retail Redevelopment Area	Board Member

Net Worth

My Net Worth as of April 10, 2024 was $ 2,660,132.96.

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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 $ 175,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER $1,000:

Description of Asset	Value of Asset
Home - 1251 Mundy Drive Jax, FL 32207	$ 747,000.00
Ally Money Market	$ 27,269.75
Ally Brokerage Account	$ 3,281.62
Ally Stock - QQQ	$ 5,681.00
Ally Stock - BA	$ 3,119.40
State Farm Whole Life Insurance Cash Value	$ 13,543.75
State Farm Whole Life Insurance Cash Value	$ 3,799.74
Fidelity Mid Cap Enhanced Index Fund - FMEIX	$ 34,149.64
Fidelity NHX203606	$ 10,824.34
Fidelity NHX203903	$ 5,599.57
Vanguard US Growth Fund Investor Shares	$ 47,471.78
Vanguard Mid Cap Value Index Admiral Shares	$ 50,620.94
Vanguard Small Cap Value Index Admiral Shares	$ 37,819.73
Charles Schwab 401k	$ 33,367.24
Business Ownership - 50% - The Carlucci Insurance Agency	$ 1,881,100.00
State Farm Whole Life Insurance Cash Value	$ 3,839.55

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Liabilities

LIABILITIES IN EXCESS OF $1,000:

Name of Creditor	Address of Creditor	Amount of Liability
US Bank	800 Nicollet Mall Minneapolis, MN 55402	$ 373,668.89
RadiFi Credit Union	562 Park St Suite 100, Jacksonville, FL 32204	$ 72,693.33
RadiFi Credit Union	562 Park St Suite 100, Jacksonville, FL 32204	$ 53,672.77

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
City of Jacksonville	117 W Duval St Jacksonville FL 32202	$ 20,467.12
The Carlucci Insurance Agency	3535 Hendricks Ave Jacksonville, FL 32207	$ 385,600.00

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

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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.

Joe A Carlucci II

Digitally signed: **06/27/2024**

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