

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 04/12/2024

General Information

Name: Curtis Richardson

CONFIDENTIAL

PID 44004

AGENCY INFORMATION

Organization	Suborganization	Title
Tallahassee	Community Redevelopment Agency Board	City Commissioner
Tallahassee	Mayor And City Commission	City Commissioner

CANDIDATE FOR

Position	Agency Name	Position sought or held
City, Town or Village (Commission or Council), Governing Board - Form 6	City of Tallahassee	City Commission, Seat 2

Net Worth

My Net Worth as of December 31, 2023 was \$ 572,720.58.

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 \$ 75,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

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Description of Asset	Value of Asset
Family Home, {REDACTED}	\$ 241,065.00
Truist Bank, 102 N. Blairstone Rd., Tall., FL 32301, Checking / Money Market	\$ 25,190.60
Brighthouse Financial, P.O. Box 4265 Clinton, IA, 52733, Tax Sheltered Annuity	\$ 109,901.90
Raymond James IRA, 2065 Thomasville Road, Suite 201, Tall., FL 32308; Stock in Wisdomtree, Inc.,	\$ 27,722.00
Raymond James IRA, 2065 Thomasville Road, Suite 201, Tall., FL 32308, RJ Bank Deposit Program,	\$ 3,994.10
SEI, 1 Freedom Valley Dr., Oaks, PA 19456; IRA stock in Domestic Fixed Income	\$ 27,272.41
SEI, 1 Freedom Valley Dr., Oaks, PA 19456; IRA stock in Domestic Equity	\$ 12,639.01
SEI, 1 Freedom Valley Dr., Oaks, PA 19456; IRA Cash and Equivalents	\$ 6,613.07
SEI, 1 Freedom Valley Dr., Oaks, PA 19456; IRA Alternative	\$ 4,338.80
SEI, 1 Freedom Valley Dr., Oaks, PA 19456; IRA stock in International Equity	\$ 3,486.36
SEI, 1 Freedom Valley Dr., Oaks, PA 19456; IRA stock in International Fixed Income	\$ 2,982.57
City of Tallahassee Retirement Plan Investment in AB Small Cap Growth Z	\$ 1,468.57
City of Tallahassee Retirement Plan Investment in Goldman Sachs Mid Cap	\$ 1,468.56
City of Tallahassee Retirement Plan Investment in Boston Partners Small Cap	\$ 1,468.56
City of Tallahassee Retirement Plan Investment in JP Morgan Mid Cap	\$ 1,468.55
City of Tallahassee Retirement Plan Investment in Jennison Fund	\$ 5,384.72
City of Tallahassee Retirement Plan Investment in T. Rowe Price	\$ 5,384.70
City of Tallahassee Retirement Plan Investment in Janus Henderson Flexible Bond	\$ 12,777.62
City of Tallahassee Retirement Plan Investment in Fixed Tallahassee Guaranteed	\$ 11,260.48

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Description of Asset	Value of Asset
Northwestern Mutual, Life Insurance Cash Value, 720 E. Wisconsin Ave, Milwaukee, WI 53202	\$ 27,391.82

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
FSU Credit Union, Auto Loan	P.O. Box 182499, Tallahassee, Florida 32318	\$ 13,124.53
Bank of America, Auto Loan	P.O. Box 17237, Wilmington, DE 19886	\$ 5,806.12

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
Florida Retirement System. Division of Retirement	P.O. Box 9000, Tallahassee, Florida 32315	\$ 39,771.24
Social Security Administration	P.O. Box 67620, Wilkes-Barre, PA 18767	\$ 30,660.00
City of Tallahassee	300 South Adams Street, Tallahassee Florida 32301	\$ 47,957.98

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.

Curtis Richardson

Digitally signed: 04/12/2024

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