

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 05/01/2024

General Information

Name: Mr James Pappalardo Jr

PID 286097

AGENCY INFORMATION

Organization	Suborganization	Title
Debary	Mayor & City Council	City Council Member

CANDIDATE FOR

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

Net Worth

My Net Worth as of March 31, 2024 was \$ 363,255.12.

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 \$ 65,700.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
130 Hickory Stick Ct. DeBary, FL	\$ 425,897.00
Fidelity ROTH IRA	\$ 23,771.10
LIBERTY MUTUAL 401(K) PLAN	\$ 33,467.24
Fidelity Rollover IRA	\$ 75,076.68
Fidelity 529 Savings Plan	\$ 3,580.31
Bank Accounts, PNC	\$ 88,372.53
Candidate Loan (Pappalardo Campaign)	\$ 5,000.00
Pappalardo Consulting LLC, 301 S Pine Shadow Dr Unit 43	\$ 3,833.76
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
PNC Bank	300 Fifth Avenue Pittsburgh, PA 15222	\$ 356,749.89

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
Comparion Insurance Agency	100 Liberty Way Dover, NH 03820	\$ 130,728.00
City of DeBary	16 Columba Rd. DeBary, FL 32713	\$ 8,600.00
PNC Bank Interest Bearing Accounts	300 Fifth Avenue Pittsburgh, PA 15222	\$ 2,537.00
M. Chiari; Sale of Primary Residence	S 68th Avenue Court. La Vista, NE, 68128	\$ 132,000.00

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.

James Pappalardo Jr

Digitally signed: 05/01/2024

Filed with COE: 05/01/2024

Pappalardo - Securities

LIBERTY MUTUAL 401(K) PLAN

Security Name/Detail	ID/Ticker	% of Fund	Market Value
Target Date 2055	N/A	100.0%	\$ 33,467.24
Total			\$ 33,467.24
		<i>bal</i>	\$ 33,467.24
		<i>check</i>	-
		<i>%check</i>	-

Fidelity ROTH IRA

Security Name/Detail	ID/Ticker	% of Fund	Market Value
FIDELITY BLUE CHIP VALUE ETF	(FBCV)	8.5%	\$ 2,012.47
FIDELITY BLUE CHIP GROWTH ETF	(FBCG)	7.3%	\$ 1,732.49
COINBASE GLOBAL INC COM CL A	(COIN)	0.7%	\$ 157.21
FIDELITY SELECT ENERGY	(FSENX)	8.7%	\$ 2,071.00
FIDELITY SELECT SEMICONDUCTORS PORT	(FSELX)	11.8%	\$ 2,811.51
FIDELITY 500 INDEX FUND	(FXAIX)	59.3%	\$ 14,092.64
FIDELITY GOVERNMENT MONEY MARKET	(SPAXX)	3.8%	\$ 893.78
Total			\$ 23,771.10
		<i>bal</i>	\$ 23,771.10
		<i>check</i>	-
		<i>%check</i>	-

Fidelity Rollover IRA

Security Name/Detail	ID/Ticker	% of Fund	Market Value
FIDELITY 500 INDEX FUND	(FXAIX)	28.6%	\$ 21,466.07
FIDELITY SELECT ENERGY	(FSENX)	1.9%	\$ 1,394.36
FIDELITY SELECT SEMICONDUCTORS PORT	(FSELX)	2.6%	\$ 1,959.89
FIDELITY BLUE CHIP VALUE ETF	(FBCV)	24.7%	\$ 18,555.29
FIDELITY BLUE CHIP GROWTH ETF	(FBCG)	32.9%	\$ 24,706.81
FIDELITY GOVERNMENT MONEY MARKET	(SPAXX)	9.3%	\$ 6,994.26
Total			\$ 75,076.68
		<i>bal</i>	\$ 75,076.68
		<i>check</i>	-
		<i>%check</i>	-

Fidelity 529 Savings Plan

Security Name/Detail	ID/Ticker	% of Fund	Market Value
NH PORTFOLIO 2039 (FIDELITY BLEND)	NHB203907	100.0%	\$ 3,580.31
Total			\$ 3,580.31
		<i>bal</i>	\$ 3,580.31
		<i>check</i>	-
		<i>%check</i>	-