

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/13/2024

General Information

Name: Hon Bonnie Jean Helms

CONFIDENTIAL

PID 257338

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (16Th)	Elected Constitutional Officer	

Net Worth

My Net Worth as of December 31, 2023 was \$ 1,076,928.00.

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 \$ 30,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
{REDACTED}Residence-Address Exempt	\$ 1,500,000.00
Wells Fargo Bank Checking and Savings Accounts	\$ 9,032.00
Fla. Deferred Comp.-Nationwide-Detail of holdings over \$1,000 attached	\$ 105,298.00
UBS IRA accounts-Detail of holdings over \$1,000 attached	\$ 43,349.00
Schwab Brokerage Account-Detail of holdings over \$1,000 attached	\$ 8,889.00
2018 Kia Sportage	\$ 12,000.00
Northwestern Mutual Life Insurance Cash Value	\$ 20,295.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Flagstar Bank	515 Corporate Drive, Troy, Michigan 48098-2639	\$ 462,898.00
Discover Home Loans	1 Corporate Drive, Suite 360, Lake Zurich, IL 60047-8945California	\$ 97,468.00
USAA	9800 Fredericksburg Rd, San Antonio, Texas 78288	\$ 6,177.00

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	\$ 169,369.00
Northwestern Mutual Life Insurance	720 E. Wisconsin Ave., Milwaukee, WI 53202	\$ 9,045.00

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

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.

Bonnie Jean Helms

Digitally signed: 06/13/2024

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Vanguard Mid-Cap ETF	2,094.00
Vanguard Growth ETF	2,798.00
Vanguard Russell 1000 Growth ETF	1,092.00
Vanguard Russell 1000 Value ETF	2,104.00
Vanguard Russell 2000 Value ETF	1,703.00
ISHARES 20+year Treasury Bond	1,681.00
ISHARES Broad USD INV Bond ETF	7,740.00
JP MORGAN USD Emerg Markest Bond ETF	1,692.00
ISHARES Broad USD High Yield Bond ETF	2,581.00
Vanguard Inter Term Treasury ETF	3,856.00
Vanguard Short Term Treasury ETF	1,692.00
Vanguard Total International ETF	4,272.75

Investment election (continued)

457(b) Plan Salary Reduction

Wasatch SmCap Gr Inst^{II} 100%

Wasatch 100%

Beneficiaries

Primary Contingent

50% 100% POSITIVE BENEFIT 100%



If no person, entity, or trust is listed as a beneficiary, a beneficiary designation may still exist on file. Please note that Nationwide does not guarantee the accuracy or completeness of any beneficiary designation(s).

Make sure your beneficiaries are the ones you want named. If you need to review and/or update, log into your account.

Investment activity

457(b) Salary Reduction

Investment option	Previous quarter balance	Contributions/ Transfers In	Exchanges	Dividends*	Investment gain/loss & Interest†	Fees/ Charges	Withdrawals/ Transfers Out	Units/ Shares	Units/ Shares price	Current quarter balance
Specialty										
Vngrd RealEst Indx Inst ^{II}	\$2,881.99	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	116,786.2	\$24.70	\$2,881.99
Small cap										
SmCap Val Eq D ^{II}	\$1,930.42	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	125,125.2	\$15.42	\$1,930.42
Wasatch SmCap Gr Inst ^{II}	\$1,942.40	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	126,701.6	\$15.33	\$1,942.40
International										
AmFds New Wld R6 ^{II}	\$4,814.28	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	112,247.7	\$42.86	\$4,814.28
TRowePr Ovrseas Stk I ^{II}	\$10,667.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	125,061.4	\$85.28	\$10,667.50
Vngrd Ttl IntlStkIndx Inst ^{II}	\$6,791.52	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	114,316.5	\$59.38	\$6,791.52
Mid cap										
JPM MdCap Val R6 ^{II}	\$2,866.83	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	115,519.7	\$24.81	\$2,866.83
TRowePr US MdCap Gr Eq D ^{II}	\$2,875.89	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	115,011.0	\$25.00	\$2,875.89
Large cap										
Fid Contra K6 ^{II}	\$3,804.89	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	115,111.1	\$33.05	\$3,804.89
TRowePr Divd Gr I ^{II}	\$6,684.46	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	114,453.3	\$58.38	\$6,684.46
TRowePr Eq Inc B ^{II}	\$9,564.89	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	115,189.9	\$82.98	\$9,564.89
TRowePr Gr Stk B ^{II}	\$5,693.39	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	115,693.1	\$49.18	\$5,693.39
Vngrd Inst Indx Inst Pls ^{II}	\$3,809.96	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	116,810.0	\$32.61	\$3,809.96
Bonds										
AmFds Emrg Mkt Bd R6 ^{II}	\$3,831.44	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	116,546.9	\$32.87	\$3,831.44
Bd Tr I T5 ^{II}	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0.0000	\$0.00	\$0.00
DodgeCox Inc I ^{II}	\$14,306.22	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	117,614.9	\$121.64	\$14,306.22
TRowePr Spectrm Inc I ^{II}	\$5,731.26	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	116,742.5	\$49.10	\$5,731.26
Short term										
Fixed Assets	\$7,579.70	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	N/A	N/A	\$7,579.70