

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 05/06/2024

General Information

Name: Mrs Amy Pritchett

PID 302439

AGENCY INFORMATION

Organization	Suborganization	Title
Martin County School District	Elected Constitutional Officer	School Board Member, District 4

Net Worth

My Net Worth as of December 31, 2023 was \$ 1,388,687.31.

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 \$ 52,802.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

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Description of Asset	Value of Asset
Residential Home 4994 SE Horseshoe Point Road Stuart FL 34997	\$ 600,000.00
Cash	\$ 1,431.88
T Rowe Price New ERA (Joint)	\$ 41,388.51
Fidelity Select Retailing (FSRPX) Joint	\$ 52,430.48
Vanguard Explorer Value Fund	\$ 28,925.51
Vanguard Strategic Small Cap Equity (Joint)	\$ 32,183.40
LPL Financial (Cash)	\$ 6,480.91
LPL Financial 529 (Mason)	\$ 12,347.36
LPL Financial 529 (Brennan)	\$ 12,347.36
LPL Financial (Consolidated Edison)	\$ 143,210.58
LPL Financial Roth IRA	\$ 11,124.12
Banker's Life IRA/Amy, Jane Wertheim	\$ 7,923.14
Banker's Life IRA/Amy, Larry Wertheim	\$ 15,721.33
Banker's Life Brokerage Account Cash	\$ 2,548.99
Banker's Life Brokerage Account Equities	\$ 13,972.09
Banker's Life Brokerage Account Exchange Traded Products	\$ 187,077.01
Banker's Life Brokerage Account Annuities	\$ 44,465.55
Banker's Life Individual Retirement Cash	\$ 8,190.13
Banker's Life Individual Retirement Exchange Traded Products	\$ 267,272.16
Banker's Life Individual Retirement Annuities	\$ 266,884.83
FRS	\$ 6,844.86

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Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
CMG Mortgage	3160 Crow Canyon Road San Ramon CA 94583	\$ 426,428.73
GMAC Lease Payment	801 Cherry St Fort Worth TX 76102	\$ 6,199.56

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
Martin County School District	1939 SE Federal Highway Stuart FL 34994	\$ 37,966.19
Consolidated Edison Retirement	One Blue Hill Plaza Pearl River NY 10965	\$ 14,920.50
Roth Account Pershing	1601 Belvedere Road STE 3015 West Palm Beach FL 33406	\$ 3,059.20
Bankers Life IR 401K	1601 Belvedere Road STE 3015 West Palm Beach FL 33406	\$ 6,250.00
Bankers Life Dividends	1 Belvedere Road STE 3015 West Palm Beach FL 33406	\$ 4,252.70
LPL Financial	Con Ed Dividends	\$ 5,047.92
T Rowe Price New ERA Joint	100 East Pratt Street Baltimore MD 21202	\$ 1,196.42
Fidelity Select Retailing Capital Gains Distribution (Joint)	P.O. Box 770001 Cincinnati OH 45277	\$ 3,258.49
Vanguard Strategic Small Cap Equity Capital Gain Distributions (Joint)	P.O. Box 982903 El Paso TX 79998	\$ 2,119.20

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.

Amy Pritchett

Digitally signed: 05/06/2024

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