

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 05/09/2024

General Information

Name: Mr James Douglas Atterholt

PID 278765

AGENCY INFORMATION

Organization	Suborganization	Title
Fort Myers Beach	Town Council	Council Member

CANDIDATE FOR

Position	Agency Name	Position sought or held
City, Town or Village (Commission or Council), Governing Board - Form 6	Town of Fort Myers Beach	Town Council

Net Worth

My Net Worth as of December 31, 2023 was \$ 1,306,878.80.

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 \$ 32,146.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Condominium 4198 Bay Beach lane #162, Fort Myers Beach, FL 33931	\$ 340,000.00
Thrift Savings Plan	\$ 402,918.83
Indiana Public Employees' Retirement Fund	\$ 79,407.30
Indiana Legislators' Defined Contribution	\$ 106,431.48
State of Indiana Deferred Compensation Plan	\$ 66,031.36
Charles Schwab Rollover IRA (\$23545.80 invested in Carnival Corp. stock)	\$ 51,054.17
Pacific Life Annuity	\$ 103,091.38
J.P. Morgan Treasury Notes	\$ 76,114.00
Chase Sapphire Checking	\$ 22,713.66
Chase Sapphire Savings	\$ 16,473.65
Northwestern Mutual Life Insurance	\$ 10,496.97

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
N/A		

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
Town of Fort Myers Beach FL	2525 Estero Blvd, Fort Myers Beach, FL 33931	\$ 16,800.00
Indiana American Water Company	152 N. Emerson Ave. Greenwood, IN 46143	\$ 16,200.00
Indiana Energy Association Inc.	One American Square, Suite 1600, Indianapolis, IN 46282	\$ 25,008.00
The Hawthorn Group	2111 Eisenhower Ave, Suite 200, Alexandria VA 22314	\$ 30,000.00

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 Douglas Atterholt

Digitally signed: 05/09/2024

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