

General Information

Name: Phillip M Anderson

PID 291865

AGENCY INFORMATION

Organization	Suborganization	Title
Winter Park	Community Redevelopment Agency	Mayor
Winter Park	Mayor And City Commission	Mayor

Net WorthMy Net Worth as of December 31, 2023 was \$ 16,417,851.00.**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 \$ 125,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
1621 Roundelay Lane, Winter Park, FL- Personal Home	\$ 1,465,674.00
1140 S Orlando Ave, Maitland, FL, Condo/Dock K-18	\$ 374,800.00
70 Aqua Vista, Florence, AL	\$ 475,450.00

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Description of Asset	Value of Asset
7050 Pensacola Blvd, Pensacola, FI (Genova Enterprises)	\$ 2,605,430.00
1600 Trail Creek Rd, Bozeman, MT (Genova Enterprises)Company	\$ 675,000.00
Cash- Schwab Bank	\$ 26,857.00
Cash- First Horizon Bank	\$ 592,369.00
Cash- Truist	\$ 223,862.00
Cash- Synovus	\$ 26,759.00
Cash- One Florida Bank	\$ 256,692.00
Pensacola Auto Warranty, LLC	\$ 14,550.00
2023 Subaru Solterra-Lease	\$ 27,000.00
Northwestern Insurance- Cash Value	\$ 105,275.00
Genova Enterprises LLC and subsidiaries, including 7050 Pensacola Blvd and 1600 Trail Creek Rd	\$ 7,819,668.84
Genova Ventures 1, LLC- incl BRDG (NYSE) Stock	\$ 1,849,415.07
American Capital Agency Corp.	\$ 80,984.32
American Century Small Cap Value	\$ 110,037.38
Annaly Capital Management	\$ 77,431.71
Apple Computer Inc	\$ 20,215.65
BBH Intermediate Municipal Bond	\$ 74,065.72
BlackRock Event Driven Equity	\$ 72,487.20
Calvert Equity I	\$ 119,483.64
Cohen & Steers Quality Inc. Realty	\$ 273,838.76
Congress Small Cap Growth I	\$ 199,422.43
First Trust Morningstar Div Leaders	\$ 426,548.84
Global Net Lease Inc	\$ 73,619.56
Goldman Sachs Intl Equity Inc I	\$ 175,357.76
Guggenheim Core Bond	\$ 295,253.66
Healthpeak Properties Ord	\$ 30,785.14
iShares S&P 500 Core	\$ 150,453.45
Janus Henderson Gbl Equity Incm.	\$ 328,316.51

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Description of Asset	Value of Asset
JPMorgan Equity Premium Income	\$ 476,374.21
Met. West Strategic Income I	\$ 266,286.32
Microsoft Corp	\$ 3,760.40
Neuberger Berman Large Cap Val I	\$ 88,187.76
Performance Trust Municipal Bond	\$ 73,772.73
Performance Trust Strategic Bond	\$ 50,942.59
PIMCO Flexible Credit Income	\$ 372,868.97
PIMCO Income	\$ 114,020.44
PIMCO Inflation Response I	\$ 15,783.34
Prospect Capital Corp.	\$ 79,945.07
Schwab US Mid-Cap	\$ 90,384.00
Schwab Value Advantage Inv.	\$ 21,288.45
Tortoise MLP & Energy Income Ins	\$ 237,845.86
Value Line Mid Cap Focused I	\$ 48,134.68
Ventas Inc	\$ 65,643.72
Victory Sycamore Estbld Value I	\$ 25,569.46
Welltower Inc Com	\$ 68,896.65
Xtrackers MSCI-EAFE High Div Eq	\$ 409,471.40

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
First Key Mortgage- 1621 Roundelay Lane	900 3rd Ave Suite 500, New York, New York 10022, US	\$ 470,783.00

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

Name of Creditor	Address of Creditor	Amount of Liability
Chase Bank (Auto floor plan loan to Genova Enterprises affiliate)	9200 Oakdale Ave, Chatsworth, CA	\$ 3,858,338.00
Synovus RE Loan (on 7050 Pensacola Blvd)	125 West Romana Blvd, Pensacola, FL	\$ 1,527,437.00

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
City of Winter Park	401 South Park Ave, Winter Park, FL	\$ 16,893.81
Anderson Automotive	7050 Pensacola Blvd, Pensacola, FL	\$ 24,171.63
Truist/Suntrust	400 South Park Ave, Winter Park, FL	\$ 5,099.19
First Horizon/Iberia/Old FL Money Market	600 Wilkinson St, Orlando, FL	\$ 4,246.00
One Florida Bank	531 W Morse Blvd, Winter Park, FL	\$ 4,952.97
Genova Enterprises LLC	1621 Roundelay Lane, Winter Park, FL	\$ 640,458.00

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Name of Source of Income Exceeding \$1,000	Address of Source of Income	Amount
Genova Ventures 1, LLC (including BRDG Stock)	1622 Roundelay Lane, Winter Park, FL	\$ 113,410.92
Sale of Winter Park Gardens L-1,	750 Melrose Ave, Winter Park, FL	\$ 6,686.00
AGNC- American Capital Agency Corp.	7373 Wisconsin Avenue, Bethesda, MD 20814	\$ 10,069.00
ACVIX- American Century Small Cap Value	430 W. 7th St. Kansas City, MO 64105	\$ 1,397.29
NLY- Annaly Capital Management	1211 Avenue of the Americas New York, NY 10036	\$ 9,344.03
BBIX- BBH Intermediate Municipal Bond	140 Broadway, New York, New York	\$ 2,046.05
BILPX- BlackRock Event Driven Equity	50 Hudson Yards New York, NY, 10001-2180	\$ 1,413.24
CEYIX- Calvert Equity I	One Post Office Square, Boston, MA 02110	\$ 1,953.62
RQI- Cohen & Steers Quality Inc. Realty	1166 Avenue of the Americas, 30th Floor, New York, New York 10036	\$ 22,027.44
FDL- First Trust Morningstar Div Leaders	120 E. Liberty Drive, Wheaton, IL 60187	\$ 19,409.16
GNL- Global Net Lease Inc	650 Fifth Avenue, 30th Floor, New York, NY 10019	\$ 2,514.11
GSIX- Goldman Sachs Intl Equity Inc I	200 West Street, New York	\$ 4,777.72
GIUSX- Guggenheim Core Bond	227 West Monroe Street Chicago, IL 60606?	\$ 12,571.12
PEAK- Healthpeak Properties Ord	5050 South Syracuse Street ? Suite 800 ? Denver, CO? 80237	\$ 1,793.18
IVV- iShares S&P 500 Core	400 Howard St, San Francisco	\$ 2,173.11
HFQIX- Janus Henderson Gbl Equity Incm.	201 Bishopsgate London EC2M 3AE United Kingdom.	\$ 26,786.74
JEPI- JPMorgan Equity Premium Income	270 Park Avenue, New York, New York	\$ 41,628.14
MWSIX- Met. West Strategic Income I	865 S Figueroa St Los Angeles, CA, 90017-2543	\$ 20,134.87
NBPIX- Neuberger Berman Large Cap Val I	1290 Avenue of the Americas, New York, New York	\$ 2,206.45
PTIMX- Performance Trust Municipal Bond	500 W. Madison Street, Suite 450. Chicago IL, 60661	\$ 2,527.64
PTIAX- Performance Trust Strategic Bond	501 W. Madison Street, Suite 450. Chicago IL, 60661	\$ 1,773.97
PFLEX- PIMCO Flexible Credit Income	650 Newport Center drive, Newport Beach, CA 92660	\$ 39,053.85
PIMIX- PIMCO Income	650 Newport Center drive, Newport Beach, CA 92660	\$ 6,539.87
PSEC- Prospect Capital Corp.	10 East 40th Street, 42nd Floor New York, NY 10016	\$ 7,995.23
SCHM- Schwab US Mid-Cap	3000 Schwab Way Westlake, TX, 76262-8104	\$ 1,357.08
RTL- The Necessity Retail REIT Inc	650, 5th Avenue 30th Floor New York, NY	\$ 6,757.50
INFIX- Tortoise MLP & Energy Income Ins	11550 Ash Street Suite 300 Leawood, KS	\$ 14,680.83
VTR- Ventas Inc	353 N. Clark Street, Chicago, Illinois, 60654	\$ 2,312.91

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Name of Source of Income Exceeding \$1,000	Address of Source of Income	Amount
VEVIX- Victory Sycamore Estbld Value I	15935 La Cantera Pkwy, San Antonio, TX 78210	\$ 1,480.14
WELL- Welltower Inc Com	4500 Dorr Street, Toledo, Ohio	\$ 1,830.35
HDEF- Xtrackers MSCI-EAFE High Div Eq	78 Sir John Rogerson's Quay, Dublin 2, Ireland	\$ 19,667.11

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
Genova Enterprises, LLC	Anderson Automotive	7050 Pensacola Blvd, Pensacola, FL	Auto Dealership
Genova Enterprises, LLC	Genova Pensacola, LLC	7050 Pensacola Blvd, Pensacola, FL	Landlord

Interests in Specified Businesses

Business Entity # 1	
Name of Business Entity	CCRC Development Corp, dba Legacy Pointe Retirement Community at UCF
Address of Business Entity	2110 Hestia Loop, Oviedo, FL
Principal Business Activity	501 (c) 3 non-profit Continuing Care Retirement Community
Postion Held with Entity	Volunteer Board member and officer
I own more than a 5% Interest in the Business	No
Nature of my Ownership Interest	Not Applicable

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.

Phillip M Anderson

Digitally signed: 05/23/2024

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