

General Information

Name: Mrs Kimberly Sullivan Amontree

PID 268019

AGENCY INFORMATION

Organization	Suborganization	Title
Charlotte County Public Schools	Elected Constitutional Officer	Board Member - District 2

CANDIDATE FOR

Position	Agency Name	Position sought or held
District School Board	Charlotte County School Board	School Board Member, District 2

Net WorthMy Net Worth as of December 31, 2023 was \$ 3,951,310.00.

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 \$ 100,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
1117 San Mateo Drive Punta Gorda, FL 33950	\$ 2,061,715.00
2111 Wisconsin Ave #412 Washington D.C.	\$ 285,000.00
JKA Real Estate Holdings, LLC (Tax Basis)	\$ 58,435.00
Rion Aesthetics, Inc (21,632 Shares)	\$ 50,000.00
Bank of America Checking	\$ 128,242.00
Bank of America Savings	\$ 57,757.00
Loan to Kim Amontree Campaign	\$ 20,000.00
Centennial Bank	\$ 117,773.00
Suncoast Credit Union	\$ 2,942.00
401 (k) Profit Sharing Plan Fidelity	\$ 779,607.00
Fidelity Investment Account	\$ 866,269.00
Fidelity IRA	\$ 30,323.00
NY 529	\$ 21,974.00
HSA Optum Bank	\$ 32,034.00

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
TD Bank	32 Chestnut St. Lewiston, ME 04243	\$ 462,225.00
First Home Mortgage	1 Corporate Drive STe 360 Lake Zurich,IL 60047	\$ 198,536.00

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
James S. Amontree, M.D. PA	2400 Harbor Blvd. #9 Port Charlotte, FL 33952	\$ 35,000.00
Independent Spin Instructor	1117 San Mateo Drive Punta Gorda FL 33950	\$ 1,520.00
Charlotte County Public Schools	1445 Education Way Port Charlotte, FL 33948	\$ 44,358.00
JKA Real Estate Holdings, LLC	2400 Harbor Blvd. #9 Port Charlotte, FL 33952	\$ 12,665.00
Fidelity Dividend Income	PO Box 28019 Albuquerque, NM 87125	\$ 14,370.00
Charlotte Endoscopic Surgery Center, LLC	23970 Suncoast Blvd Port Charlotte, FL 33980	\$ 68,238.00

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
JKA Real Estate	Millennium Physician Group	13813 Metro Pkwy Fort Myers, FL 33912	Medical

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.

Kimberly Sullivan Amontree

Digitally signed: 05/22/2024

Filed with COE: 05/22/2024