

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 05/29/2024

General Information

Name: Mr Greg Sutton

PID 85536

AGENCY INFORMATION

Organization	Suborganization	Title
Jacksonville Beach	Mayor And City Council	Council Member, At Large, Seat 3

CANDIDATE FOR

Position	Agency Name	Position sought or held
City, Town or Village (Commission or Council), Governing Board - Form 6	City of Jacksonville Beach	At-Large, Seat 3

Net Worth

My Net Worth as of December 31, 2023 was \$ 2,504,000.00.

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 \$ 105,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
47 Tallwood Road, Jacksonville Beach, FL	\$ 1,000,000.00
Bank Accounts (Coastline Fed CU)	\$ 212,378.34
CSX Common Stock	\$ 4,992.48
Southern Company Common Stock	\$ 15,952.48
Fidelity - USABLE Life SERP	\$ 6,196.98
Fidelity 401k SP 500 Index PL CL	\$ 31,182.43
Fidelity 401k Galliard Stable RTN X	\$ 54,346.26
Fidelity 401k SS Target Ret 2030 IV	\$ 978,304.51
Lincoln National Variable Annuity	\$ 137,195.83
Kestra Investment Svcs Money Mkt	\$ 2,514.91
Kestra Investment Svcs Mutual Funds	\$ 26,992.49
Kestra Investment Svcs IRA Money Mkt	\$ 12,241.76
Kestra Investment Svcs IRA Mutual Funds	\$ 262,289.62
Fidelity Investment - Cash	\$ 1,939.12

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Truist Bank	P.O. Box 79041 Baltimore, MD	\$ 277,117.16
Space Coast Credit Union	P.O. Box 419001 Melbourne, FL 32941	\$ 11,136.76

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
USable Life / Florida Blue	17500 Chenal Pkwy Little Rock, AR 72223	\$ 374,212.66
City of Jacksonville Beach	11 North 3rd Street Jax Beach FL 32250	\$ 12,960.00
Dividends and Capital Gains from Kestra Investment Svcs	5705 Southwest Pkwy Austin, TX 78735	\$ 2,014.00

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**

Name of Business Entity	USAbLe Life
Address of Business Entity	17500 Chenal Pkwy Little Rock AR
Principal Business Activity	Insurance
Postion Held with Entity	Vice President
I own more than a 5% Interest in the Business	No
Nature of my Ownership Interest	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.

Greg Sutton

Digitally signed: **05/29/2024**

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