

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 11/20/2024

General Information

Name: Gloria Branch

CONFIDENTIAL

PID 311127

AGENCY INFORMATION

Organization	Suborganization	Title
Palm Beach County School Board	Elected Constitutional Officer	Board Member District 5

Net Worth

My Net Worth as of December 31, 2023 was \$ 3,708,800.00.

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 \$ 482,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Primary Residence {REDACTED}	\$ 3,000,000.00
Lexus Financial lease, PO Box 4102, Carol Stream, IL 60197	\$ 31,000.00
Stifel, 2650N. Military Trail #400, Boca Raton, FL 33431	\$ 553,000.00
Truist Bank Account, 701 N. Federal Hwy., Boca Raton, FL 33432	\$ 12,000.00
See Attached	

Liabilities**LIABILITIES IN EXCESS OF \$1,000:**

Name of Creditor	Address of Creditor	Amount of Liability
New Rez	PO BOX619063, Dallas, TX 75261	\$ 289,000.00
Paradise Bank (paid off April 2024)	2420 N. Federal Hwy., Boca Raton, FL 33431	\$ 49,200.00
Lexus Financial	PO BOX 4102, Carol Stream, IL 60197	\$ 13,178.00

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
Cloud Computing Concepts	110 E. Atlantic Ave, Ste 420, Delray Beach, FL 33444	\$ 8,240.00
Palm Beach County School Board	3300 Forest Hill Blvd., West Palm Beach, FL 33406	\$ 15,363.00

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

Based on the office or position you hold, the certification of training required under Section 112.3142, F.S., is not applicable to you 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.

Gloria Branch

Digitally signed: 06/05/2024

Filed with COE: 11/20/2024

STIFEL

ASSET DETAILS (continued)

PORTFOLIO ASSETS - HELD AT STIFEL (continued)

Equities			
	Symbol/ Type	Quantity	Current Value
BLOCK INC CL A	SQ	150	11,602.50
ISHARES S&P 500 GROWTH ETF	IVW	562.136	42,216.41
SECTOR INDUSTRIAL SELECT SECTOR SPDR ETF	XLI	252.405	28,771.64
Preferreds			
	Symbol/ Type	Quantity	Current Value
APOLLO GLOBAL MANAGEMENT INC FXD RT RESET JR SUB NOTE FXD/VAR 09/15/2053	APOS	2,044.543	56,163.59
Mutual Funds			
Open-End Funds			
	Symbol/ Type	Quantity	Current Value
MONEY MARKET OBLIGS FEDERATED HERMES PRIME CASH OBLIGS CL CII	PCDXX	403.070	403.07
Mutual Funds			
Closed-End Funds			
	Symbol/ Type	Quantity	Current Value
ARES CAPITAL CORP	ARCC	5,183.552	103,826.54

PORTFOLIO ASSETS - HELD AT STIFEL

Stifel Smart Rate Program	<i>Symbol/ Type</i>	<i>Quantity</i>	<i>Current Value</i>
STIFEL SMART RATE STIFEL BANK & TRUST	Cash	90,769.860	90,769.86
[REDACTED]			
[REDACTED]			
[REDACTED]			
[REDACTED]			
[REDACTED]			
[REDACTED]			
[REDACTED]			

ASSET DETAILS (continued)

PORTFOLIO ASSETS - HELD AT STIFEL (continued)

Mutual Funds	<i>Symbol/ Type</i>	<i>Quantity</i>	<i>Current Value</i>
Closed-End Funds			
NEUBERGER BERMAN ENERGY INFRASTRUCTURE & INCOME FUND	NML	2,046.597	14,080.58

PORTFOLIO ASSETS - HELD AT STIFEL

Equities	<i>Symbol/ Type</i>	<i>Quantity</i>	<i>Current Value</i>
APPLE INC	AAPL	254.057	48,913.59
BOEING COMPANY	BA	50.992	13,291.57
CITIGROUP INC	C	353.990	18,209.24
MICROSOFT CORP	MSFT	156.320	58,782.57
PAYPAL HOLDINGS INC	PYPL	150	9,211.50

PORTFOLIO ASSETS - HELD AT STIFEL

Equities	<i>Symbol/ Type</i>	<i>Quantity</i>	<i>Current Value</i>
AGNC INVESTMENT CORP	AGNC	1,492.638	14,642.77
CARNIVAL CORP PAIRED CTF	CCL	210.615	3,904.80
SECTOR INDUSTRIAL SELECT SECTOR SPDR ETF	XLI	186.780	21,291.05