

2022 Form 6X - Amendment to Full and Public Disclosure of Financial Interests

Filed with COE: 05/18/2024

General Information

Name: Diane Elaine Hutchings

PID 221325

AGENCY INFORMATION

Organization	Suborganization	Title
Clay County	Elected Constitutional Officer	

Net Worth

My Net Worth as of December 31, 2022 was \$ 1,363,890.41.

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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 \$ 87,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
FF Checking	\$ 6,578.00
FF Savings	\$ 3,711.72
Checking	\$ 19,069.58
Savings	\$ 151,686.65
HSA	\$ 15,111.30
Clearbridge Mutual Fund AG	\$ 3,356.44
Cash Value Life Insurance	\$ 35,863.15
Investment Account	\$ 547,133.46
See Attached	

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Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
First Florida CU	PO Box 43310 Jacksonville, FL 32203	\$ 44,639.89
Flagstar Bank/Mortgage	PO Box 619063, Dallas, TX 75261	\$ 346,000.00

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.

☐ I elect to file a copy of my 2022 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
Clay County Tax Collector Office	477 Houston Street, Green Cove Springs, FL 32043	\$ 137,000.00
Ancora Management	2233 Park Avenue St. 105, Orange Park, FL 32073	\$ 5,000.00

SECONDARY SOURCES OF INCOME (Major customers, clients, etc. of businesses owned by reporting person):

Business Entity	Major Sources of Business Income	Address	Principal Business Activity of Source
Ancora Management LLC, Managing Partner	Public Charter Schools	2233 Park Avenue St. 105, Orange Park, FL 32073	Education Service Provider

Interests in Specified Businesses**Business Entity # 1**

N/A

Training

- ☒ 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.

Amendment Reason

Explanation of changes why are you amending your previous form 6 submission?

When I filed I did not add my specific account balances due to an oversight of the requirement. This amendment completes all requirements.

Signature of Reporting Official or Candidate

Under the penalties of perjury, I declare that I have read the foregoing Form 6X and that the facts stated in it are true.

Diane Elaine Hutchings

Digitally signed: **05/18/2024**

Filed with COE: **05/18/2024**

0001547 03 AB 0.488 03 00009 LPDM9111 5FJM 6EPG 000010
PTC CUST ROLLOVER IRA FBO
DIANE ELAINE HUTCHINGS
5341 DEER ISLAND ROAD
GREEN COVE SPRINGS FL 32043

Retirement Account Model Wealth Portfolios

Account Number: [REDACTED]
4th Quarter 2022 Statement

Values as of December 31, 2022



Investment Objective
Growth



Your Account Executive: Christian Barnett
904-359-6800
1461 Kingsley Ave
Orange Park, FL 32073

Value on January 1, 2022

\$0.00

Value as of last statement 11/30/2022

\$571,644.¹⁰

Value on December 31, 2022

\$547,133.⁴⁶

\$740,000
\$672,000
\$604,000
\$536,000
\$468,000
\$400,000

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Net Invested
Since 01/25/2022
\$610,458

Net Change

Account Summary

	4th Quarter 10/01 - 12/31/2022	Year to Date 01/01 - 12/31/2022
Starting Value	\$502,853.99	—
Total Change in Value of Assets	\$44,279.47	\$547,133.46
Inflows	—	\$610,458.78
Outflows	—	—
Net Investment Returns and Non-Cash Transfers	\$44,279.47	(\$63,325.32)
Total Ending Value (December 31, 2022)	\$547,133.46	\$547,133.46

Retirement Summary

	2022
Retirement Contributions applied to year...	—
Retirement Distributions applied to year...	—

Retirement Account Model Wealth Portfolios

Account Holdings As of December 31, 2022

Cash and Cash Equivalents

Description	Interest / Dividend Paid in December	Interest / Dividend Rate ²	Current Balance
Deposit Cash Account ³			
BANK OZK			\$13,207.93
Total Deposit Cash Account	\$4.78	0.500%	\$13,207.93
Total Cash and Cash Equivalents			\$13,207.93

Equities and Options

Security ID / Description	Quantity	Price (\$)	Market Value (\$)	Estimated Annual Income (\$)• Est 30-Day Yield•
AKAM AKAMAI TECHNOLOGIES INC ^c	53	\$84.30	4,467.90	—
ALLE ALLEGION PUBLIC LTD ^c	42	\$105.26	4,420.92	68 1.56%
AXP AMERICAN EXPRESS CO ^c	30	\$147.75	4,432.50	62 1.41%
AON AON PLC CL A ^c	16	\$300.14	4,802.24	35 0.75%
WRB BERKLEY W R CORP ^c	62	\$72.57	4,499.34	24 0.55%
BA BOEING COMPANY ^c	23	\$190.49	4,381.27	—
CHRW C H ROBINSON WORLDWIDE INC NEW ^c	48	\$91.56	4,394.88	117 2.66%
CZR CAESARS ENTERTAINMENT INC NEW ^c	103	\$41.60	4,284.80	—
CNP CENTERPOINT ENERGY INC ^c	145	\$29.99	4,348.55	110 2.53%
CHTR CHARTER COMMUNICATIONS INC NEW CL A ^c	14	\$339.10	4,747.40	—
CINF CINCINNATI FINANCIAL CORP ^c	43	\$102.39	4,402.77	118 2.70%
CME CME GROUP INC CL A ^c	25	\$168.16	4,204.00	100 2.38%
DVA DAVITA INC ^c	60	\$74.67	4,480.20	—

Equities and Options continued on next page...

² Bank Deposit Sweep Interest is the current rate. Money Market Sweep dividend is a 30-day yield.

³ Bank Deposit Sweep Accounts are FDIC insured, are not obligations of LPL Financial or SIPC, and are not available for margin purposes. See message section for further information.

[•] Refer to the statement message titled ESTIMATED ANNUAL INCOME (EAI) AND ESTIMATED YIELD (EY) for information on how this figure is calculated.

Retirement Account Model Wealth Portfolios

Account Holdings As of December 31, 2022 *Continued*

Equities and Options *Continued*

Security ID / Description	Quantity	Price (\$)	Market Value (\$)	Estimated Annual Income (\$)• Est 30-Day Yield•
XRAY DENTSPLY SIRONA INC [©]	140	\$31.84	4,457.60	70 1.57%
DLR DIGITAL REALTY TRUST INC [©]	44	\$100.27	4,411.88	214 4.87%
DISH DISH NETWORK CORP CL A [©]	276	\$14.04	3,875.04	— —
DOW DOW INC [©]	80	\$50.39	4,031.20	224 5.56%
ECL ECOLAB INC [©]	27	\$145.56	3,930.12	57 1.46%
ESS ESSEX PROPERTY TRUST INC [©]	21	\$211.92	4,450.32	184 4.15%
XOM EXXON MOBIL CORP [©]	46	\$110.30	5,073.80	167 3.30%
FAST FASTENAL CO [©]	89	\$47.32	4,211.48	110 2.62%
FITB FIFTH THIRD BANCORP [©]	137	\$32.81	4,494.97	180 4.02%
GEN GEN DIGITAL INC [©]	190	\$21.43	4,071.70	95 2.33%
GPN GLOBAL PAYMENTS INC [©]	47	\$99.32	4,668.04	47 1.01%
INTC INTEL CORP [©]	170	\$26.43	4,493.10	248 5.52%
LYV LIVE NATION ENTERTAINMENT INC [©]	62	\$69.74	4,323.88	— —
MGM MGM RESORTS INTL [©]	130	\$33.53	4,358.90	1 0.03%
MU MICRON TECHNOLOGY INC [©]	89	\$49.98	4,448.22	40 0.92%
TAP MOLSON COORS BEVERAGE COMPANY CLASS B [©]	86	\$51.52	4,430.72	130 2.95%
NRG NRG ENERGY INC NEW [©]	138	\$31.82	4,391.16	193 4.40%
OXY OCCIDENTAL PETROLEUM CORP [©]	67	\$62.99	4,220.33	2 0.06%

Equities and Options continued on next page...

• Refer to the statement message titled ESTIMATED ANNUAL INCOME (EAI) AND ESTIMATED YIELD (EY) for information on how this figure is calculated.

Account Holdings As of December 31, 2022 *Continued*

Equities and Options *Continued*

Security ID / Description	Quantity	Price (\$)	Market Value (\$)	Estimated Annual Income (\$) ^a Est 30-Day Yield ^a
PXD PIONEER NATURAL RESOURCES CO ^c	20	\$228.39	4,567.80	521 11.41%
PLD PROLOGIS INC ^c	35	\$112.73	3,945.55	110 2.80%
PSA PUBLIC STORAGE INC ^c	16	\$280.19	4,483.04	128 2.86%
SEE SEALED AIR CORP NEW ^c	88	\$49.88	4,389.44	70 1.60%
SPG SIMON PROPERTY GROUP INC NEW ^c	39	\$117.48	4,581.72	280 6.13%
SBUX STARBUCKS CORP ^c	46	\$99.20	4,563.20	97 2.14%
UAL UNITED AIRLINES HOLDINGS INC ^c	111	\$37.70	4,184.70	— —
ZION ZIONS BANCORPORATION N A ^c	91	\$49.16	4,473.56	149 3.34%
Total of Equities and Options			171,398.24	3,951
^c Dividends and/or capital gains distributed by this security will be distributed as cash.				

ETPs, Mutual Funds, Exchange-Traded Closed-End Funds and Interval Funds

Security ID / Description	Quantity	Price (\$)	Market Value (\$)	Estimated Annual Income (\$) ^a Est 30-Day Yield ^a
EKSYX ALLSPRING DIVERSIFIED INCOME BUILDER INSTL CL ^R	1,794.041	\$5.16	9,257.25	436 4.71%
BIICX BLACKROCK MULTI ASSET INCOME INSTL CL ^R	2,728.407	\$9.55	26,056.28	1,332 5.11%
CSVZX COLUMBIA SELECT LARGE CAP VALUE INSTL CL ^R	755.522	\$31.24	23,602.50	490 2.08%
DBLTX DOUBLELINE TOTAL RETURN BOND CL I ^R	1,027.582	\$8.77	9,011.89	351 3.90%
SVAIX FEDERATED HERMES STRATEGIC VALUE DIVIDEND INSTL CL ^R	1,316.501	\$5.82	7,662.03	318 4.16%

ETPs, Mutual Funds, Exchange-Traded Closed-End Funds and Interval Funds continued on next page...

^a Refer to the statement message titled ESTIMATED ANNUAL INCOME (EAI) AND ESTIMATED YIELD (EY) for information on how this figure is calculated.

Retirement Account Model Wealth Portfolios

Account Holdings As of December 31, 2022 *Continued*

ETPs, Mutual Funds, Exchange-Traded Closed-End Funds and Interval Funds *Continued*

Security ID / Description	Quantity	Price (\$)	Market Value (\$)	Estimated Annual Income (\$) ^a Est 30-Day Yield ^a
HACAX HARBOR CAP APPREC INSTL CL I [®]	113.905	\$62.76	7,148.67	—
HQIIX HARTFORD EQUITY INCOME CL I [®]	694.714	\$19.97	13,873.43	288 2.08%
LSGRX LOOMIS SAYLES GROWTH CL Y [®]	805.897	\$16.28	13,120.00	22 0.17%
EPSYX MAINSTAY EPOCH GLOBAL EQUITY YIELD CL I [®]	905.635	\$19.15	17,342.91	466 2.69%
MEIIX MFS VALUE CL I [®]	624.091	\$47.79	29,825.30	528 1.77%
NPSRX NUVEEN PREFERRED SECS & INCOME CL I [®]	500.044	\$15.04	7,520.66	446 5.94%
QUSIX PEAR TREE POLARIS FOREIGN VALUE SMALL CAP INSTL CL I [®]	560.592	\$13.26	7,433.44	124 1.68%
PBDPX PIMCO INVESTMENT GRADE CREDIT BOND CL IZ [®]	856.365	\$8.63	7,390.42	329 4.46%
UBVSX UNDISCOVERED MANAGERS BEHAVIORAL VALUE CL I [®]	105.259	\$75.33	7,929.16	71 0.90%
VEA VANGUARD FTSE DEVELOPED MKTS ETF	998	\$41.97	41,886.06	1,498 3.58%
VWO VANGUARD FTSE EMERGING MARKETS ETF	392	\$38.98	15,280.16	567 3.71%
VUG VANGUARD GROWTH ETF	188	\$213.11	40,064.68	285 0.71%
BIV VANGUARD INTERMEDIATE TERM BOND ETF	69	\$74.32	5,128.08	122 2.38%
BLV VANGUARD LONG TERM BOND INDEX ETF	55	\$72.44	3,984.20	160 4.02%
VMBS VANGUARD MORTGAGE BACKED SECURITIES ETF	111	\$45.52	5,052.72	111 2.21%
BSV VANGUARD SHORT TERM BOND ETF	108	\$75.28	8,130.24	119 1.47%
VB VANGUARD SMALL CAP ETF	62	\$183.54	11,379.48	179 1.58%
BNDX VANGUARD TOTAL INTL BOND INDEX ETF	215	\$47.43	10,197.45	377 3.70%

ETPs, Mutual Funds, Exchange-Traded Closed-End Funds and Interval Funds continued on next page...

^a Refer to the statement message titled ESTIMATED ANNUAL INCOME (EAI) AND ESTIMATED YIELD (EY) for information on how this figure is calculated.

Retirement Account Model Wealth Portfolios

Account Holdings As of December 31, 2022 *Continued*

ETPs, Mutual Funds, Exchange-Traded Closed-End Funds and Interval Funds *Continued*

				Estimated Annual Income (\$) ^a
Security ID / Description	Quantity	Price (\$)	Market Value (\$)	Est 30-Day Yield ^a
				828
VTV VANGUARD VALUE ETF	244	\$140.37	34,250.28	2.42%
Total of ETPs, Mutual Funds, Exchange-Traded Closed-End Funds and Interval Funds			362,527.29	9,447

^a Dividends and/or capital gains distributed by this security will be reinvested.