

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 05/26/2024

General Information

Name: Dr Brandon Lee Young

PID 204915

AGENCY INFORMATION

Organization	Suborganization	Title
South Daytona	Mayor and City Council	Councilmember

CANDIDATE FOR

Position	Agency Name	Position sought or held
City, Town or Village (Commission or Council), Governing Board - Form 6	City of South Daytona	City Council Seat 1

Net Worth

My Net Worth as of December 31, 2023 was \$ 1,861,062.82.

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 \$ 304,025.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

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Description of Asset	Value of Asset
TIAA Traditional	\$ 28,192.61
Delaware Small Cap Value Fund Institutional Class (DEVIX)	\$ 60,747.78
Dodge & Cox International Stock Fund - Class X (DOXFX)	\$ 64,045.11
Harbor Small Cap Growth Fund - Institutional Class Shares (HASGX)	\$ 57,103.33
JPMorgan Mid Cap Growth Fund Select Class (HLGEX)	\$ 63,949.61
MFS Mid Cap Value Fund Class R4 (MVCJX)	\$ 3,919.03
Vanguard Real Estate Index Institutional (VGSNX)	\$ 57,796.72
Vanguard Small-Cap Index Fund Institutional (VSCIX)	\$ 69,728.86
Vanguard Total International Stock Index Fund Institutional (VTSNX)	\$ 123,132.76
Vanguard Windsor II Fund Admiral (VWNAX)	\$ 13,558.27
WCM Focused International Growth Fund - Institutional Class (WCMIX)	\$ 9,419.54
Vanguard Wellesley Income Fund Admiral (VWIAX)	\$ 90,455.54
Vanguard Mid-Cap Index	\$ 62,145.76
Vanguard Primcap Admin	\$ 196,882.59
Vanguard Total Stock Market Index	\$ 9,657.86
MFS International NeDi R4	\$ 58,308.30
JP Morgan Large CpGRW R6	\$ 175,116.38
Vanguard Wellington ADM	\$ 138,382.49
Alphabet Inc Cap Stock Class C (GOOG)	\$ 1,691.16
Apple Inc (AAPL)	\$ 67,385.50
Brown Advisory Growth Equity Fund (BAFGX)	\$ 9,380.61
Fuller & Thaler Behavioral (FTHSX)	\$ 7,927.05
Comubia Contratian Core Fund (SMGIX)	\$ 9,478.72
MFS Research Fund (MRFIX)	\$ 11,572.12
T.Rowe Price US Equity Research Fund (PRCOX)	\$ 7,743.23
Allspring Special Mid Cap (WFMIX)	\$ 7,741.12
Empower Aggressive Profile	\$ 74,580.03

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Description of Asset	Value of Asset
SouthState Checking	\$ 4,930.36
SouthState Money Market	\$ 5,002.36
TIAA Checking	\$ 5,000.00
TIAA Money Market	\$ 5,099.30
Raymond James Cash Account	\$ 6,550.71
Coinbase	\$ 1,381.24
2825 Sauls Street South Daytona FL 32119	\$ 825,000.00

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
SouthState Bank	1101 First Street South Winter Haven, FL 33880	\$ 600,022.41
Ally Auto Financial	P.O. Box 71119. Charlotte, NC 28272	\$ 47,569.62
GM Financial	P.O. Box 99605, Arlington, TX 76096	\$ 50,734.00
Honda Financial	PO Box 70252 Philadelphia, PA 19176	\$ 29,743.88

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
Embry-Riddle Aeronautical University	1 Aerospace Blvd Daytona Beach, FL 32124	\$ 269,981.00
City of South Daytona	1672 S. Ridgewood Ave, South Daytona, FL 32119	\$ 16,800.00

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

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.

Brandon Lee Young

Digitally signed: 05/26/2024

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