

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/10/2024

General Information

Name: Hon Ellen Sly Masters

CONFIDENTIAL

PID 39009

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (10Th)	Elected Constitutional Officer	Circuit Judge

Net Worth

My Net Worth as of December 31, 2023 was \$ 3,255,611.00.

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 \$ 50,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
House (2186 Lakeview, Lakeland-Value per Property Appraiser)	\$ 238,712.00
House (2180 Lakeview, Lakeland -Value per Property Appraiser)	\$ 131,311.00
House w/ efficiency(Ridgewood St/Pennsylvania Ave., Lakeland -Value per Property Appraiser)	\$ 397,016.00

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Description of Asset	Value of Asset
Vacant Lot ({REDACTED} Port Charlotte-Value per Property Appraiser)	\$ 10,519.00
Home (address confidential per F.S. 119.071-Value per Property Appraiser)	\$ 537,275.00
River Source (Annuity)	\$ 37,711.00
Cetera (Annuity)	\$ 75,000.00
Edward Jones (IRA-American Funds-Bond Fund A; Cap Wrld Grw & Inc., Grwth Fd of Am. A)	\$ 29,069.00
Edward Jones (Money Market)	\$ 66,009.00
Edward Jones (Mutual Funds-Am New Perspec. A-48,316; Am Wash. Mut. A-54,210)	\$ 102,526.00
Edward Jones (Stock-Apple (114,848) Bristol Myers Squibb (513); Constellation Energy (3337); Exelon (2297); Fuel cell (1.60); General Motors (2262), HP Inc Com (1504); Kraft Heinz CS (776); Microsoft (8272); Mondelez Int (4273) Target(11,767)Walmart(1576))	\$ 150,444.00
American Express National Bank (Savings)	\$ 21,981.00
Regions Bank (Checking)	\$ 1,548.00
Sofi Bank (Checking (7317) Savings (8522))	\$ 15,839.00
Capital One (Checking (136) Savings (73670) Money Market (8592))	\$ 82,398.00
MidFlorida C.U. (Checking 23827) Savings (2352) C.D.s (77259))	\$ 103,438.00
Wells Fargo Bank (Checking (47,273) Savings (5361) CD (50783))	\$ 103,417.00
Deferred Comp-Pretax less 37%-Voya (Am Funs-Am Balanced, Growth Fund, New Perspective); Vanguard Target Retire, Fidelity 500 Index; JP Morgan Mid Cap Growth) (632,110-233,880(37%))	\$ 398,229.00
Deferred Comp-Pretax less 37%-Nationwide Fixed Fund (203,908)incl. self-directed option w/ Schwab (stocks - 30,454-Amgen, AT&T, Bristol-Myers Squibb, Verizon Comm, Wast Mgmt, Inc.) (234,363-86714 (37%))	\$ 147,649.00
SEP Acct -Pretax less 37% - Capital Group American Funds (Fund. Invest. A) {REDACTED}	\$ 217,238.00
Florida Deferred Retirement Option - Pretax but value not reduced per instructions	\$ 327,282.00

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Description of Asset	Value of Asset
Treasury Direct (Savings Bond)	\$ 11,000.00

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
N/A		

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

Name of Creditor	Address of Creditor	Amount of Liability
N/A		

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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
Florida State Courts (income amount before deferred compensation reductions)	OSCA, Tallahassee, FL	\$ 182,000.00
Edward Jones (Interest-1,702)(Dividends - 4559), Capital Gain Dist. (\$4465)	201 Progress Parkway, Maryland Heights, MO 63043-3042	\$ 10,726.00
Capital One (Interest)	1680 Capital One Dr., McLean, VA	\$ 2,626.00
Midflorida CU (Interest)	129 S. Kentucky Ave., Lakeland, FL	\$ 1,926.00
Lakeview Rentals (gross income amount before expenses/repairs/etc.)	Lakeview Street, Lakeland, FL	\$ 13,210.00
Pennsylvania/Ridgewood Studio Rental (gross rec'd-before util/expenses/repair, etc.)	Ridgewood St/Penn. Ave, Lakeland, FL	\$ 14,400.00

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.

Ellen Sly Masters

Digitally signed: 06/10/2024

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