

General Information

Name: Hon Allison Tant Richard

PID 287682

AGENCY INFORMATION

Organization	Suborganization	Title
House Of Representatives	Elected Constitutional Officer	State Representative

CANDIDATE FOR

Position	Agency Name	Position sought or held
State Representative	Florida House of Representatives	State Representative

Net WorthMy Net Worth as of May 30, 2024 was \$ 12,973,523.70.**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 \$ 210,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 05/30/2024

Description of Asset	Value of Asset
6035 Boynton Homestead, Tallahassee, FL	\$ 1,475,000.00
16 Beachberry, Santa Rosa Beach, FL	\$ 4,000,000.00
State of Florida Retirement System	\$ 5,786.82
Hancock Whitney Bank	\$ 545,677.85
Regions Bank CD	\$ 28,878.50
First Florida Credit Union	\$ 5,774.63
Florida Prepaid College Account	\$ 10,789.20
Truist Bank	\$ 200,568.51
American Express Savings Account	\$ 5,854.33
Federated Hermes Prime Cash Obligation FD CL WS M/M	\$ 469,500.00
Raymond James Bank Deposit Program	\$ 10,651.88
Abbott Labs	\$ 20,790.00
Abbvie Inc	\$ 23,559.00
Alphabet Inco Cap STK CLASS C	\$ 88,165.00
Altria Group Inc	\$ 6,823.50
American Century Short Duration STR INC FD CL I N/L	\$ 260,114.30
Apple Incorporated	\$ 1,652,826.00
Arcadium Lithium PLC COM SHS	\$ 45,232.80
AT&T Inc	\$ 52,500.00
Berkshire Hathaway Inc DEL CLASS B New	\$ 81,482.00
Blackrock Global Allocation Fund INSTL CL N/L	\$ 11,908.72
Chargepoint Holdings Inc Com Class A	\$ 2,314.00
Chevron	\$ 11,831.25
Chipotle Mexican Grill Inc	\$ 31,516.30
Conoco Phillips	\$ 23,450.00
CVS Health Corporation	\$ 16,662.00
Devon Energy	\$ 48,150.00
Disney Walt Company	\$ 30,528.00
Enbridge Inc	\$ 5,327.28

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Description of Asset	Value of Asset
First TR Exchange Trade FD INDXX Aerospace & Defense ETf	\$ 28,655.00
First Trust Aerospace Defense Portfolio Series 41 Term 8/28/25 Reinv Fee semi-annaul	\$ 59,802.86
First Trust Aerospace & Defense Portfolio Series 42 Term 11/14/25 Reinv Fee Semi-Annaul	\$ 171,243.52
First Trust Aerospace & Defense Portfolio Series 41 tern 8/28/25 Reinv semi-annual	\$ 13,804.59
First Trust Energy Alphadex Fund	\$ 18,460.00
First Trust Energy Select Portfolio Series 86 Term 12/02/24 Reinv Semi-annual	\$ 33,568.82
First Trust Energy Select Portfolio Series 89 Term 8/28/25 Reinv fee Semi-annual	\$ 107,369.63
First Trust FT 60/40 Target Income Port Ser Term 3/21/25 Reinv Fee monthly	\$ 203,929.14
First Trust NASDAQ Artificial Intelligence & Robotics EFT	\$ 129,570.00
First Trust NASDAQ CEA Cybersecurity EFT	\$ 55,710.00
First Trust NYSE ARCA Biotechnology Index Fund	\$ 30,298.00
First Trust US Infrastructure Port Ser 32 Term 04/25/25 Reinv fee Semi-annual	\$ 95,781.73
First Trust Vest LC Deep Buffered 20 Port 54 Term 07/14/25 Cash Fee	\$ 150,216.74
Ford Motor Compay DEL	\$ 12,160.00
GE Aerospace Com New	\$ 3,011.94
GOPRO Inc Class A	\$ 1,540.00
ISHARES TR TIPS BD ETF	\$ 21,288.00
Lincoln National Life Insurance Co - Lincoln Choice Plus Design NON-QUALIFIED	\$ 622,973.98
MACOM Tech Solutions Holdings Inc	\$ 11,051.64
Marathon Oil Cor	\$ 25,560.00
NIKE Inc Class B	\$ 27,525.00
Phillips 66	\$ 28,536.00
Proctor & Gamble Co	\$ 32,570.01

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Description of Asset	Value of Asset
Putnam Diversified Income trust Fund CL YN/L	\$ 1,594.11
RegenXBIO Inc	\$ 37,300.00
Sanofi Sponsored ADR	\$ 29,124.00
Shell PLC SPON ADS	\$ 19,457.50
Solid Power Inc Class A Com	\$ 3,560.00
Southern Co	\$ 11,662.50
SPDR Gold Shares	\$ 6,477.60
T. Rowe Price Equity Income Fund Investor CL N/L	\$ 226,647.76
Telephone & Data Systems Inc Com New	\$ 18,770.00
Uniti Group Inc REIT	\$ 58,320.00
US Treasury Notes 1.5% 11/30/24 1.5% Due 11/30/24	\$ 205,871.40
US Treasury Notes 1.875% 8/31/24 1.875 % due 8/31/24	\$ 247,627.50
US Treasury Notes 2% 5/31/24 2% due 5/31/24	\$ 399,740.00
US Treasury Notes 2.5% 12/31/24 2.25% due 12/31/24	\$ 196,398.00
Verizon Communications Inc	\$ 64,458.28
Vulcan MATLS Co	\$ 38,887.50
Walmart Inc	\$ 71,918.00
Raymond James Bank Deposit Program	\$ 2,971.10
Abbott Labs	\$ 20,790.00
ABBVIE Inc	\$ 23,559.00
Alphabet Inc Cap STK Class C	\$ 176,330.00
Apple Inc	\$ 417,956.00
Conoco Phillips	\$ 23,450.00
Enbridge Inc	\$ 5,327.28
First Trust Energy Select Portfolio Series 87 Term 2/28/25 Reinv fee semi-annual	\$ 29,046.15
GE Aerospace Com New	\$ 3,011.94
ISHARES TR TIPS BD EFT	\$ 21,288.00
Marathon Oil Corp	\$ 12,780.00

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Description of Asset	Value of Asset
Phillips 66	\$ 14,268.00
Proctor & Gamble Co	\$ 16,037.01
Regenxbio Inc	\$ 7,460.00
Sanofi sponsored ADR	\$ 9,708.00
Shell PLC Spon Ads	\$ 10,623.00
Southern Co	\$ 11,662.50
Uniti Group Inc REIT	\$ 3,240.00
Vulcan Matls Co	\$ 38,887.50

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		

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
Salary, State of Florida	House of Representatives, 400 S Monroe Street, Tallahassee, FL 32399	\$ 14,182.95
Dividend/Interest from investment Raymond James & Associates	2065 Thomasville Road, Ste 201, Tallahassee, FL 32308	\$ 40,089.07

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.

Allison Tant Richard

Digitally signed: 05/30/2024

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