

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 05/24/2024

General Information

Name: Hon Robert Marc Gross

CONFIDENTIAL

PID 12041

AGENCY INFORMATION

Organization	Suborganization	Title
4Th District Court Of Appeal	Elected Constitutional Officer	Judge

Net Worth

My Net Worth as of January 1, 2024 was \$ 5,536,817.00.

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 \$ 270,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
{REDACTED} Home	\$ 1,200,000.00
Limited Partnership Tysons View 1%	\$ 400,000.00
Deferred Retirement Option Retirement Account	\$ 705,000.00
Stock American Tower REIT Inc.	\$ 21,588.00

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Description of Asset	Value of Asset
Stock Alexandria Real Estate	\$ 13,310.00
Stock American Express Company	\$ 22,480.00
Stock Brookfield Asset Management	\$ 6,025.00
Stock Bank of New York Mellon	\$ 5,465.00
Stock Boston Properties Inc.	\$ 7,367.00
Stock Crown Castle Inc	\$ 34,557.00
Stock Americold Realty Trust Inc.	\$ 16,345.00
Stock Caretrust Reit Inc.	\$ 9,399.00
Stock Digital Realty Inc.	\$ 14,803.00
Stock Enbridge Inc.	\$ 3,241.00
Stock Equity Residential	\$ 3,363.00
Stock Iron Mountain Reit Inc.	\$ 13,996.00
Stock Main Street Cap Corp	\$ 9,726.00
Stock NNN Reit Inc.	\$ 5,172.00
Stock Realty Income Corp.	\$ 16,151.00
Stock Oneok Inc.	\$ 4,213.00
Stock Ishares Preferred	\$ 1,559.00
Stock Prologis Inc.	\$ 34,658.00
Stock Rexford Indl. Rlty Inc.	\$ 12,622.00
Stock Stag Industrials Inc.	\$ 17,274.00
Stock AT&T Inc.	\$ 1,678.00
Stock Vici Pptys Inc.	\$ 13,708.00
Stock Vanguard Dividend	\$ 4,260.00
Stock Vanguard International Dividend	\$ 8,330.00
Stock Vanguard High Div. Yield	\$ 3,907.00
Stock W.P. Carey Inc.	\$ 2,592.00
Mutual Fund Pimco Income	\$ 1,241.00
Mutual Fund Vanguard Dividend Appreciation	\$ 17,500.00
Mutual Fund Vanguard Intl. Div. Aprec. Index	\$ 15,449.00

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Description of Asset	Value of Asset
Mutual Fund Vanguard Int. Term Corp. Bond	\$ 16,828.00
Mutual Fund Vanguard Intl High Div. Index	\$ 16,811.00
Mutual Fund Vanguard Wellington	\$ 97,174.00
Mutual Fund Vanguard Int. Term Tax Ex. Bond	\$ 85,008.00
Mutual Fund Voya Fixed Account	\$ 30,931.00
Mutual Fund Pimco Diversified Income	\$ 71,561.00
Mutual Fund Vanguard 2020	\$ 387,744.00
Mutual Fund American Funds New Perspective	\$ 299,036.00
CD J P Morgan Chase	\$ 12,003.00
CD Wells Fargo Bank	\$ 4,000.00
Mutual Fund Akre Focus Retail	\$ 15,686.00
Mutual Fund American 2020 Target	\$ 16,186.00
Mutual Fund T Rowe Price Div Growth	\$ 3,700.00
Mutual Fund T Rowe Price 2020 Fund	\$ 8,797.00
Stock American Express Co.	\$ 18,734.00
Stock Bank of America	\$ 33,670.00
Stock Berkshire Hathaway Class B	\$ 71,332.00
Stock J P Morgan Chase & Co.	\$ 38,272.00
Stock Lowe's	\$ 25,593.00
Stock Merck	\$ 81,765.00
Stock Norfolk Southern	\$ 29,547.00
Stock Nvidia Corp	\$ 27,237.00
Stock Aberdeen Healthcare Investors	\$ 16,570.00
Stock SPDR S & P 500 ETF	\$ 110,271.00
CD Charles Schwab	\$ 29,997.00
CD J P Morgan Chase Bank	\$ 20,108.00
CD JP Morgan Chase Bank	\$ 30,612.00
New York City Muni Bond	\$ 25,135.00
Triborough Bridge Muni Bond	\$ 25,057.00

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Description of Asset	Value of Asset
Mutual Fund American Global Balanced	\$ 9,077.00
Mutual Fund American New Perspective	\$ 69,875.00
Mutual Fund Fidelity Biotechnology	\$ 8,202.00
Mutual Fund Franklin Dynatech	\$ 25,022.00
Mutual Fund MSILF Treasury	\$ 75,667.00
Private Equity CPG Vintage Access III	\$ 45,425.00
Private Equity MS Direct Lending	\$ 46,728.00
Private Equity NH Tactical Value Fund	\$ 282,471.00
MS Bank Deposit Program	\$ 4,642.00
Stock Blackrock Innovation ETF	\$ 45,150.00
Mutual Fund Fidelity Money Market	\$ 15,379.00
CD Ally Bank	\$ 2,000.00
CD Citigroup	\$ 1,963.00
Bond Credit Suisse	\$ 1,988.00
Bond Credit Suisse	\$ 1,950.00
Bond Fed. Hme Loan Bank	\$ 9,923.00
Bond Fed. Home Loan Bank	\$ 10,050.00
Bond Fed Farm Credit Bank	\$ 1,945.00
Bond Goldman Sachs	\$ 1,954.00
Bond Goldman Sachs	\$ 1,906.00
CD J P Morgan Chase	\$ 5,002.00
CD J P Morgan Chase	\$ 4,003.00
CD J P Morgan Chase	\$ 2,003.00
CD Morgan Stanley	\$ 5,019.00
CD Wells Fargo	\$ 1,959.00
Stock ABBV	\$ 15,497.00
Stock Agree Realty	\$ 7,554.00
Mutual Fund American	\$ 8,352.00
Stock Brookfield Asset Management	\$ 6,025.00

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Description of Asset	Value of Asset
Mutual Fund Blackrock Strategic Inc.	\$ 3,661.00
Stock Brookfield Renewable Partners	\$ 18,396.00
Stock Brookfield Renewable Corp	\$ 5,470.00
Stock Brookfield Infrastructure Partners	\$ 44,873.00
Stock Brookfield Infrastructure Corp	\$ 7,408.00
Stock Vanguard Int. Bond	\$ 4,582.00
Stock Blackstone Inc	\$ 3,273.00
Stock Camden Prop Trust	\$ 1,985.00
Stock CVS	\$ 8,685.00
Stock BNY Mellon Infrastructure Bond	\$ 2,835.00
Mutual Fund Fidelity Intermediate Income	\$ 4,247.00
Stock Federal Realty Trust	\$ 17,518.00
Stock Aberdeen Healthcare	\$ 1,657.00
Stock Ishares Int. Div. ETF	\$ 2,799.00
Stock Johnson & Johnson	\$ 3,918.00
Stock Kenvue Inc.	\$ 2,153.00
Stock Lilly	\$ 12,824.00
Stock Next Era Energy	\$ 6,194.00
Stock Next Era Energy Partners	\$ 9,123.00
Stock Nuveen Municipal Value	\$ 2,236.00
Stock NVE Corp	\$ 7,843.00
Stock Realty Income	\$ 25,839.00
Mutual Fund Pimco Income	\$ 4,970.00
Stock Scheab Div. Equity ETF	\$ 19,793.00
Mutual Fund Fidelity Money Market	\$ 3,250.00
Stock Cohen & Steers Infrastructure	\$ 6,372.00
Stock Vanguard Healthcare ETF	\$ 25,070.00
Stock Vici Inc	\$ 6,376.00
Stock Vanguard Dividend Growth ETF	\$ 17,040.00

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Description of Asset	Value of Asset
Stock Vanguard Real Estate ETF	\$ 7,068.00
Stock Vanguard High Dividend ETF	\$ 17,860.00
Stock Vanguard Int. High Div ETF	\$ 1,662.00
Stock Xcel Energy	\$ 6,191.00
Stock SPDR Energy ETF	\$ 6,707.00
Cash Bank of America	\$ 23,837.00

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Bank of America	PO Box 851001 Dallas Texas 75285	\$ 89,793.00

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
State of Florida	200 E. Gaines Street Tallahassee Florida 32399-0356	\$ 201,476.00
Social Security Administration	Washington DC	\$ 40,800.00
Tysons View Limited Partership	2206 Pimmet RunLane, Falls Chruch Virginia	\$ 19,000.00

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.

Robert Marc Gross

Digitally signed: 05/24/2024

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