

General Information

Name: Joan Michelle Stone

PID 266374

AGENCY INFORMATION

Organization	Suborganization	Title
Marion County	Community Redevelopment Agency	County Commissioner, District 5
Marion County	Elected Constitutional Officer	County Commissioner, District 5
Withlacoochee Reg. Water Supply Authority	Board of Directors	Board of Directors Member

CANDIDATE FOR

Position	Agency Name	Position sought or held
County Commission	Marion County	County Commissioner

Net WorthMy Net Worth as of December 31, 2023 was \$ 6,793,316.00.

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 \$ 190,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
MainStreet Community Bank, 112 N. Magnolia Ave Ocala, FL 34475	\$ 48,300.00
Stone Petroleum Products, Inc, 904 SE 1st Terr Ocala, FL 34475	\$ 5,000,000.00
Stone Property Holdings, LLC, 904 SE 1st Terr Ocala, FL 34475	\$ 500,000.00
Personal Residence, 5170 NW 110th Ave Ocala, FL 34482	\$ 995,000.00
Suntrust Bank Retirement Plan, P.O. Box 199749 Dallas, TX 75219	\$ 185,000.00
Raymond James & Assoc. 1294 SE 24th Rd Ocala, FL 34471	\$ 178,500.00
FRS Pension Investment	\$ 101,516.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
PNC Bank	2620 SW 19th Ave Rd Ocala, FL 34471	\$ 402,000.00
Jaguar Finance	P.O. Box 78232 Phoenix, AZ 85062	\$ 3,000.00

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. 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
Marion Co. Board of County Commissioners	601 SE 25th Ave Ocala, FL 34471	\$ 97,034.00

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.

Joan Michelle Stone

Digitally signed: 05/24/2024

Filed with COE: 05/24/2024

JERRY FURLONG

Raymond James Financial Services, Inc.
Raymond James Financial Services Advisors, Inc.
110 NE 11TH AVE | OCALA, FL 34470
(352) 629-9138
raymondjames.com/practicalplanners
Jerry.Furlong@RaymondJames.com

Joan IRA Freedom Equity Income
JOAN MICHELLE STONE IRA
RJ TRUST CO NH - CUSTODIAN
5170 NW 110TH AVE
OCALA FL 34482-1832708

Raymond James Client Services
800-647-SERV (7378)
Monday - Friday 8 a.m. to 9 p.m. ET

Online Account Access
raymondjames.com/clientaccess

Linked Account Summary - Primary Account ‡

Value This Statement		This Statement	Year to Date
\$178,499.98			
Last Statement		Beginning Balance	\$179,312.39
\$179,312.39		Deposits †	\$0.00
Prior Year-End		Income	\$168.82
\$179,312.39		Withdrawals †	\$0.00
		Expenses	\$(431.03)
		Change in Value	\$(550.20)
		Ending Balance	\$178,499.98

† Figures reflect a summary of activity in all linked accounts, including internal transfers between accounts.

Linked Accounts

Account	Current Value	Estimated Annual Income	Page
Joan IRA Freedom Equity Income	\$123,866.48	\$3,953.15	2
Joan IRA	\$54,633.50	\$1,295.50	6
Total Relationship Value	\$178,499.98	\$5,248.65	

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Raymond James Financial Services, Inc.
Raymond James Financial Services Advisors, Inc.

Joan IRA Freedom Equity Income Account Summary - [REDACTED]

Advisory

Registered to: JOAN MICHELLE STONE IRA | RJ TRUST CO NH - CUSTODIAN | 5170 NW 110TH AVE | OCALA FL 34482-1832708

		This Statement	Year to Date
Value This Statement			
\$123,866.48			
Last Statement	Prior Year-End		
\$123,843.91	\$123,843.91		
Time-Weighted Performance*			
YTD	2023		
0.02%	7.40%		
		Beginning Balance	\$123,843.91
		Deposits	\$0.00
		Income	\$168.15
		Withdrawals	\$0.00
		Expenses	\$(431.03)
		Change in Value	\$285.45
		Ending Balance	\$123,866.48

Performance Inception: 10/16/2014

Important Messages

- Your account purpose is Wealth Accumulation & Provide Income, with a moderate risk tolerance and a 10 to 20 year time horizon.
- Your Distribution Standing Withholding Elections
 - Federal Withholding Election (No Election on File)
 - State (FL) Withholding Election (State Withholding not available)

Please see Standing Withholding Elections on the Understanding Your Statement page.
- Primary Beneficiaries: Charles Stone (100.00%)

Your Portfolio

For more information,
visit raymondjames.com/clientaccess

	Quantity	Price	Value	Gain or (Loss)°	Estimated Annual Income
Cash & Cash Alternatives					
Raymond James Bank Deposit Program ‡ 0.25% - Selected Sweep Option			\$1,972.72		\$4.93
Raymond James Bank			\$1,972.72		
Your bank priority state: FL					
Participating banks recently added: Wells Fargo Bank, NA 12/15/2023; Atlantic Union Bank 11/01/2023					
‡ Please see the Raymond James Bank Deposit Program on the Understanding Your Statement page.					
Estimated Income Yield for RJBDP was calculated as of 01/29/2024.					
Cash & Cash Alternatives Total			\$1,972.72		\$4.93

JERRY FURLONG
Raymond James Financial Services, Inc.

Joan IRA Account Summary

Brokerage

Registered to: JOAN MICHELLE STONE IRA | RJ TRUST CO NH - CUSTODIAN | 5170 NW 110TH AVE | OCALA FL 34482-1832708

		This Statement	Year to Date
Value This Statement	Beginning Balance	\$55,468.48	\$55,468.48
\$54,633.50	Deposits	\$0.00	\$0.00
	Income	\$0.67	\$0.67
	Withdrawals	\$0.00	\$0.00
	Expenses	\$0.00	\$0.00
	Change in Value	\$(835.65)	\$(835.65)
	Ending Balance	\$54,633.50	\$54,633.50
Last Statement	Prior Year-End		
\$55,468.48	\$55,468.48		
Dollar-Weighted Performance*			
YTD	2023		
(1.51)%	12.75%		

Performance Inception: 07/21/2014

Important Messages

- Your account purpose is Wealth Accumulation & Provide Income, with an aggressive risk tolerance and a 10 to 20 year time horizon.
- Your Distribution Standing Withholding Elections
 - Federal Withholding Election (No Election on File)
 - State (FL) Withholding Election (State Withholding not available)
 Please see Standing Withholding Elections on the Understanding Your Statement page.
- Primary Beneficiaries: Charles Stone (100.00%)

Your Portfolio

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	Quantity	Price	Value	Gain or (Loss) ^o	Estimated Annual Income
Cash & Cash Alternatives					
Raymond James Bank Deposit Program ‡ 0.25% - Selected Sweep Option			\$3,194.60		\$7.98
Citibank NA			\$3,194.60		

Your bank priority state: FL

Participating banks recently added: Wells Fargo Bank, NA 12/15/2023; Atlantic Union Bank 11/01/2023

‡ Please see the Raymond James Bank Deposit Program on the Understanding Your Statement page.

Estimated Income Yield for RJBDP was calculated as of 01/29/2024.

Cash & Cash Alternatives Total **\$3,194.60** **\$7.98**