

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/03/2024

General Information

Name: KAREN ROSE

PID 81782

AGENCY INFORMATION

Organization	Suborganization	Title
School Board Of Sarasota County	Elected Constitutional Officer	Board Member, District 2

Net Worth

My Net Worth as of May 25, 2024 was \$ 5,475,565.00.

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 \$ 250,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
8557 Milestone Dr. Sarasota Fl 34238-Residence	\$ 470,000.00
5922 Albert Pl. Sarasota Fl 34231	\$ 400,000.00
3545 Cleveland Ave. Ft.,. Myers-1/2 Interest JDG Miller Hldgs LLC	\$ 250,000.00

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Description of Asset	Value of Asset
Tamiami Trail North Port Fl-1/2 interest Meade Real Property holdings LLC	\$ 125,000.00
3046 Markridge Rd. Sarasota Fl-1/2 interest DD&GMiller LLC	\$ 230,000.00
2512 Post Rd. Sarasota Fl-1/2 interest DD&G Miller LLC	\$ 210,000.00
3014 Bispham Rd. Sarasota Fl-1/2 interest DD&G Miller LLC	\$ 210,000.00
1084 Sun&Sea Dr. Sarasota Fl-1/2 interest DD&G Miller LLC	\$ 350,000.00
Trustist Checking	\$ 142,072.00
American Century Ultra Fund	\$ 244,883.00
American Century Money Market	\$ 20,650.00
American Century Int. Tax Free Bond Fund	\$ 298,578.00
Stock-American Movil SAB	\$ 3,190.00
Stock-Boston Berr Inc	\$ 8,162.00
Stock-Del Monte Fresh Produce	\$ 1,889.00
Stock-Intel	\$ 2,605.00
Stock-Jack in the Box	\$ 5,227.00
Stock-Jones, Lang & LaSalle	\$ 4,379.00
Stock-Stryker Corp.	\$ 7,926.00
Stock-Occidental	\$ 2,536.00
1st Mortgage Receivable-2645 Dubey Sarasota Fl	\$ 128,934.00
1st Mortgage Receivable-806 Albritton Ave. Sarasota Fl	\$ 70,000.00
1st Mortgage Receivable-13269 Heather Ridge Ft. Myers Fl	\$ 145,000.00
1st Mortgage Receivable-3105 65th St. East Bradenton, Fl	\$ 230,000.00
BOA Checking-JD&G Miller Hldg. LLC	\$ 20,262.00
BOA Checking-Highland Property Management LLC	\$ 6,340.00
1st Mortgage 1652 Main St. Sarasota Fl -Highland Prperty Mgt. LLC	\$ 35,500.00
BOA Checking-Meade Real Property Holdings LLC	\$ 5,920.00
Wells Fargo Checking-DD&G Holdings Miller LLC	\$ 119,181.00

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Description of Asset	Value of Asset
IRA-American Century Equity Growth	\$ 119,651.00
IRA-American Century Strategic Income	\$ 85,578.00
IRA-American Century Sustainable Equity Fund	\$ 74,767.00
IRA-Fidelity Select Comm Equipment	\$ 17,362.00
IRA-Fidelity Select Semiconductors	\$ 589,064.00
IRA-T. Rowe Price Latin America Fund	\$ 67,031.00
401K Empower	\$ 661,452.00
Stock-CarMax	\$ 12,417.00

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Truist	Greenville SC	\$ 200,360.00

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
Sarasota County School Board	1960 Landing Blvd. Sarasota Fl	\$ 42,110.00
Social Security Admin.	Wilkes-Bar, Pa	\$ 33,561.00
Florida Retirement System	PO Box 9000 Tallahassee, Fl	\$ 64,502.00

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	
Name of Business Entity	DD & GG Miller LLC
Address of Business Entity	246 Island Circle Sarasota Fl
Principal Business Activity	Real Estate Related Investment
Postion Held with Entity	Member

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I own more than a 5% Interest in the Business	Yes
Nature of my Ownership Interest	Member
Business Entity # 2	
Name of Business Entity	Meade Real Property Holding LLC
Address of Business Entity	246 Island Circle Sarasota Fl
Principal Business Activity	Real Estate Related Investment
Postion Held with Entity	member
I own more than a 5% Interest in the Business	Yes
Nature of my Ownership Interest	member
Business Entity # 3	
Name of Business Entity	JD&G Miller Holdings LLC
Address of Business Entity	246 Island Circle Sarasota Fl
Principal Business Activity	Real Estate Related Investment
Postion Held with Entity	member
I own more than a 5% Interest in the Business	Yes
Nature of my Ownership Interest	member
Business Entity # 4	
Name of Business Entity	Highland Property Management LLC

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Address of Business Entity	246 Island Circle Sarasota Fl
Principal Business Activity	Real Estate Investment Related
Postion Held with Entity	Member
I own more than a 5% Interest in the Business	Yes
Nature of my Ownership Interest	Member

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.

KAREN ROSE

Digitally signed: 06/03/2024

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