

General Information

Name: Karen Rushing

CONFIDENTIAL**PID 13605****AGENCY INFORMATION**

Organization	Suborganization	Title
Sarasota County	Elected Constitutional Officer	Clerk Of Circuit Court

CANDIDATE FOR

Position	Agency Name	Position sought or held
Clerk of the Courts and Comptroller	Sarasota County Clerk of the Circuit Court and County Comptroller	Sarasota CountyClerk of the Circuit Court and County Comptroller

Net WorthMy Net Worth as of December 31, 2023 was \$ 9,848,823.09.

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 \$ 38,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Homestead {REDACTED}	\$ 500,000.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
PHH Mortgage	P.O. Box 94087, Palatine IL 60094	\$ 185,122.92

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
Public Salary	P.O. Box 3079 Sarasota FL	\$ 173,075.25
Social Security Administration	P.O Box 310120 Jamaica NY 11431	\$ 42,644.00

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.

Karen Rushing

Digitally signed: 05/30/2024

Filed with COE: 05/30/2024

	A	B
1	2023	
2	Karen E. Rushing, Sarasota Clerk & Comptroller	
3	Non IRA-Summit Brokerage Services Inc. STOCK	Market Value
4	Air Prods & Chems Inc Com	\$27,380.00
5	Alphabet Inc Cap STK CL C	\$28,186.00
6	Altria Group Inc MO	\$20,170.00
7	Automatic Data Processing	\$34,945.50
8	Fedex Corp Com	\$37,945.50
9	Honeywell International	\$31,456.50
10	Johnson & Johnson	\$31,348.00
11	Microsoft Corp	\$112,812.00
12	Nextera Energy Inc	\$48,592.00
13	Packing Corp Amer Com	\$32,582.00
14	Proshares TR S&P 500 DV Arist EFT	\$71,400.00
15	Smith A O Corp	\$41,220.00
16	Suburban Propane Partners L P Unit LTD Part Int	\$26,640.00
17	Valmont Inds Inc Com	\$17,513.25
18	Vanguard Index FDS Vanguard STK MKT EFT	\$71,166.00
19	Verizon Communications Inc Com	\$33,930.00
20	Corp Backed TR CTFS 20044-6 Goldman Sachs Cap 1 DEB	\$25,300.00
21	Cash	\$134,421.33
22	Total Non IRA Cetera Brokerage Service	\$827,008.08
23	IRA-Summit Brokerage Services Inc. Stock Market Value	
24	ABBVIE INC	\$ 46,491.00
25	Altria Group INC	6,051.00
26	CVS Health Corp Com	27,636.00
27	JPMorgan Chase & Co	\$51,030.00
28	Hubbell Inc Com	\$32,893.00
29	Lockhead Martin Corp	\$45,324.00
30	FDIC Bank Deposits	\$49,219.92
31	Total IRA Cetera Brokerage Service	258,644.92
32	Nationwide 457 Deferred Comp. (Mutual Fund)	Market Value
33	American Cent. HI Inc R6	164,243.97
34	DE SMCap Cor Inst	\$160,500.36
35	Fld Contra	\$780,634.70
36	Fld Puritan	\$21,674.17
37	Invesco Opp Gbl A	\$133,841.06
38	NW SP 500 Indx Inst Svc	\$105,028.20
39	Nationwide Fixed	\$641,258.35
40	Tchstn Md Cap Y	\$143,073.99
41	Total 457 Def Comp Nationwide	\$2,150,254.80

	A	B
42	FRS Investment Plan	Market Value
43	FRS Stable Value Fund (350)	\$637,929.04
44	FRS Core Plus Bond Fund (310)	\$1,161,431.50
45	FRS U.S. Stock (340)	\$4,384,092.64
46	Total FRS Investment Plan	\$6,183,453.18
47	Cash Checking Truist	\$34,276.74
48	Cash Saving Achieva	\$2,308.29
49	Total Cash Checking/Savings Accounts	\$36,585.03
50	2023	
51	Karen E. Rushing, Sarasota Clerk & Comptroller	