

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/02/2024

General Information

Name: Mr Erick Lawrence Carter

PID 266584

AGENCY INFORMATION

Organization	Suborganization	Title
Collier County Public Schools	Elected Constitutional Officer	School Board Member

Net Worth

My Net Worth as of December 31, 2023 was \$ 2,126,515.72.

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 \$ 17,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
1964 Alamanda Dr Apt 5 Naples FL 34102	\$ 190,900.00
181 Grand Oaks Way apt 101 Naples FL 34110	\$ 282,550.00
1373 Wisconsin Dr Naples FL .34103	\$ 691,717.00
3435 10th St N unit 5 Naples FL 34103	\$ 84,170.00

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Description of Asset	Value of Asset
3435010th St N unit 6 Naples FL 34103	\$ 143,450.00
2011 Ford F-150	\$ 23,000.00
2011 Ford Cobra Mustang	\$ 25,000.00
2016 Toyota Corolla	\$ 12,000.00
I Bond	\$ 10,000.00
Verizon Stocks	\$ 4,447.03
Cisco Systems Stocks	\$ 3,015.35
Loan to campaign	\$ 30,000.00
Business Checking/Savings	\$ 179,993.24
Personal Checking/Savings	\$ 25,317.84
Raymond James Bank Deposit Program	\$ 3,463.61
AMG Yacktman fund CI	\$ 21,104.26
JPMorgan strategic income opportunities fd	\$ 53,956.99
Lazard Global Listed infrastructure port instl	\$ 30,829.67
smead value fund cl	\$ 61,972.12
Vanguard dividend growth fund investor cl	\$ 29,631.51
Pacer us cash cows 100 etf	\$ 39,484.80
schwab us dividend equity etf	\$ 19,632.45
spdr health care select	\$ 33,679.20
us treasury notes	\$ 17,910.90
jpmorgan equity premium income fund cl i n/l	\$ 33,326.73
catalyst/millburn hedge strategy fund cl i n/l	\$ 33,489.96
AKRE FOCUS FUND RETAIL CL N/L	\$ 9,917.22
Bitcoin	\$ 6,022.73
FRS	\$ 49,317.07
Hair is Everything Inc	\$ 150,000.00
Salon Zenergy Inc	\$ 150,000.00

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
So-Fi	PO Box 11733 Newark NJ 07101-4733	\$ 339,783.96

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

Name of Creditor	Address of Creditor	Amount of Liability
N/A		

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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
Rental income	181 Grand Oaks Way #101 Naples FL	\$ 24,300.00
Rental income	3435 10th St N Naples FL unit 5 & 6 and 5	\$ 28,575.00
rental income	1964 Alamanda Dr Naples FL apt 5	\$ 26,000.00
Salon Zenergy dividends	2950 Tamimi Trl N suite 4 naples fl	\$ 2,760.00
Hair is Everything dividends	2950 Tamiami Trl N suite 4 Naples FL	\$ 27,310.00
Hair is Everything salary	2950 Tamiami Trl N suite 4 Naples FL 34103	\$ 40,000.00
Collier County Public Schools	5775 Osceola Trail Naples FL 34109	\$ 45,653.00

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
Hair is Everything	services	2950 Tamami Trl N	Hair Salon
Salon Zenergy	station rental	2950 Tamami Trl N	Hair Salon

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.

Erick Lawrence Carter

Digitally signed: 06/02/2024

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