

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 05/28/2024

General Information

Name: Malissa Morgan

PID 223672

AGENCY INFORMATION

Organization	Suborganization	Title
Okeechobee County School Board	Elected Constitutional Officer	Vice Chair

CANDIDATE FOR

Position	Agency Name	Position sought or held
District School Board	Okeechobee County School Board	School Board Member

Net Worth

My Net Worth as of December 31, 2023 was \$ 1,041,500.00.

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 \$ 290,300.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
4728 Hwy 441 SE Okeechobee FL 34974	\$ 425,000.00
A Child's World North 703 SW 6th Street Okeechobee FL 34974 (50%)	\$ 310,281.00
A Child's World South 4664 Hwy 441 SE Okeechobee FL 34974	\$ 300,888.00
State Farm (100%)	\$ 100,000.00
FRS (100%)	\$ 76,895.00
TIAA CREF (100%)	\$ 4,782.88
Seacoast Checking (100%)	\$ 44,954.60
Seacoast Checking (100%)	\$ 5,445.40
Seacoast Savings RAM (Custodial Account)	\$ 4,500.53
Seacoast Saving RTM (Custodial Account)	\$ 2,000.05
Seacoast MMA (50%)	\$ 171,402.38

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Seacoast National Bank (Boat)	1409 S Parrott Avenue Okeechobee FL 34974	\$ 36,805.37
Seacoast National Bank (ACW)	PO Box 9012 Stuart Fl 34993	\$ 232,851.26
Navient	PO Box 9500 Wilkes Barre PA 18773 9500	\$ 44,496.52

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
Okeechobee County School Board W2	700 SW 2nd Avenue Okeechobee FL 34974	\$ 22,733.30
A Child's World Childcare and Preschool, Inc. W2	703 SW 6th Street Okeechobee FL 34974	\$ 89,133.08
A Child's World Childcare and Preschool, Inc. Distributive Shares	703 SW 6th Street Okeechobee FL 34974	\$ 46,549.00

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.

Malissa Morgan

Digitally signed: 05/28/2024

Filed with COE: 05/28/2024