

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 05/30/2024

General Information

Name: Sen Daniel W. Burgess Jr

PID 202311

AGENCY INFORMATION

Organization	Suborganization	Title
Senate	Elected Constitutional Officer	State Senator, District 23

CANDIDATE FOR

Position	Agency Name	Position sought or held
State Senate	Florida Senate	State Senator, District 23

Net Worth

My Net Worth as of December 31, 2023 was \$ 180,747.69.

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 \$ 242,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Real Property, Residence - 6730 Northlake Drive Zephyrhills, FL 33542	\$ 466,000.00
Checking Account, Suncoast Credit Union	\$ 15,000.00
Savings Account, Suncoast Credit Union	\$ 12,000.00

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Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Discover Student Loans (Law School)	PO Box 6107 Carol Stream, IL 60197	\$ 11,961.00
MidFlorida Credit Union (Auto Loan)	PO Box 8008 Lakeland FL 33802	\$ 27,000.00
MidFlorida Credit Union (Auto Loan)	PO Box 8008 Lakeland FL 33802	\$ 35,542.00
Carrington Mortgage (Home Loan)	PO Box 5001 Westfield, IN 46074	\$ 256,165.00
Firstmark Student Loans (Law School)	PO Box 2977 Omaha NE 68103	\$ 29,137.76
BMO (RV Auto Loan)	111 W. Monroe St. Chicago, IL 60603	\$ 116,446.55
San Antonio Citizens Federal Credit Union	12542 Curley Street San Antonio FL 33576	\$ 78,000.00

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
State of Florida	200 E Gaines Street Tallahassee FL 32399	\$ 28,442.12
DFAS/United States Army Reserve	8899 E. 56th Street Indianapolis IN 46249	\$ 27,286.68
Shumaker Loop & Kendrick, LLP	101 E Kennedy Blvd Ste 2800, Tampa, FL 33602	\$ 220,000.00

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.

Daniel W. Burgess Jr

Digitally signed: 05/30/2024

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