

2023 Form 6X - Amendment to Full and Public Disclosure of Financial Interests

Filed with COE: 05/30/2024

General Information

Name: Hon Carol-Lisa Phillips

CONFIDENTIAL

PID 82005

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (17Th)	Elected Constitutional Officer	

Net Worth

This section not amended by filer.

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 \$ 450,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
See Attached		

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

Name of Creditor	Address of Creditor	Amount of Liability
See Attached		

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
See Attached		

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
This section not amended by filer.			

Interests in Specified Businesses**Business Entity # 1**

This section not amended by filer.

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.

Amendment Reason

Explanation of changes why are you amending your previous form 6 submission?

Changes include a listing of specific assets with Merrill Lynch Account and 401K, Savings and Profit Sharing Plan. Changes also provide complete addresses of each creditor and source of income listed.

Signature of Reporting Official or Candidate

Under the penalties of perjury, I declare that I have read the foregoing Form 6X and that the facts stated in it are true.

Carol-Lisa Phillips

Digitally signed: **05/30/2024**

Filed with COE: **05/30/2024**

Amendment to Form 6- (6x)

Assets: (on page 2)

Merrill Lynch Account- Invesco American Mutual Fund

401K, Savings and Profit Sharing:

BONDS:

USA (Gov't) 5% 30-SEP-2025

USA (Gov't) 4.625% 30-JUN-2025

USA (Gov't) 2.25% 15-DEC-2025

USA (Gov't) 3.125% 15-AUG-2025

USA (Gov't) 4.25% 31-DEC-2025

USA (Gov't) 1.25% 30-JUN-2028

USA (Gov't) 4.125% 31-MAR-2029

USA (Gov't) 4.875% 30-APR-2026

USA (Gov't) 4.625% 28-FEB-2026

USA (Gov't) 1.125% 31-AUG-2028

STOCKS:

Voya Retirement & Annuity: 19.21%

Transamerica: 16.24%

Pacific Life Ins.: 15.72%

Met Tower Life: 15.52%

Prudential Ins. Co.: 15.39%

State Street Bank: 14.74%

STOCKS Continued:

Northern Trust STIF: 3.18%

Microsoft Corp.: 6.76%

Apple Inc.: 5.78%

NVIDIA Corp.: 4.99%

Amazon.com Inc.: 3.74%

Alphabet Inc. Class A: 2.24%

Meta Platforms Inc.: 2.21%

Alphabet Inc. Class C: 1.90%

Berkshire Hathaway Inc.: 1.69%

Eli Lilly and Co.: 1.46%

Broadcom Inc.: 1.34%

Vistra Corp: .98%

Carlisle Companies, Inc.: .72%

Williams-Sonoma Inc: .71%

GoDaddy Inc.: .66%

EMCOR Group Inc.: .65%

Reliance Inc.: .63%

Pure Storage Inc.: .57%

Owens Corning: .57%

Lennox International, Inc.: .57%

Watsco Inc.: .54%

Taiwan Semiconductor Manufacturing Co Ltd: 1.94%

STOCKS Continued:

Novo Nordisk A/S: 1.37%

ASML Holding NV: 1.16%

Tencent Holdings Ltd: .96%

Samsung Electronics Co Ltd: .87%

Nestle SA: .87%

Toyota Motor Corp: .79%

Shell PLC: .76%

LVMH Moet Hennessy Louis Vuitton SE: .74%

AstraZeneca PLC: .73%

LIABILITIES: (page 3)

Mortgage, Truist Bank-(Complete Address) PO Box 819, Wilson, North Carolina, 27894

Mortgage, Elliot Frimer-(Complete Address) 1830 SW 81 Way, Davie, FL 33324

Cameron Partners Investments-(Complete Address) 4700 Powerline Road, Oakland Park, FL 33309

INCOME: (page 4)

State of Florida (Complete Address) 200 E Gaines Street, Tallahassee, FL 32399

Lauderdale Boat Yard, LLC (Complete Address) 3100 State Road 84, Fort Lauderdale, FL 33312

Port Lauderdale, LLC (Complete Address) 3318 SE 6th Avenue, Fort Lauderdale, FL 33316

EXPLANATION OF CHANGES:

The Changes include a listing of specific assets within the Merrill Lynch Account and the 401K, Savings and Profit Sharing Plan. Changes also provide addresses of each creditor and source of income listed.