

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/03/2024

General Information

Name: Mr Jody Phillips

PID 289733

AGENCY INFORMATION

Organization	Suborganization	Title
Florida Clerks of Court Operations Corporation	Executive Council	
Jacksonville	Council & Constitutional Officers	Clerk of Circuit Court

Net Worth

My Net Worth as of June 2, 2024 was \$ 423,755.37.

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 \$ 179,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Residence 11330 Beagle Lane 32221	\$ 497,295.00
Bank Account 121 Financial	\$ 19,673.15
Bank Account Vystar	\$ 45,972.07
Annuity Prudential	\$ 53,995.96
IRA LPL Financial	\$ 41,416.38
Investment Account LPL Financial - Cash	\$ 20,044.11
See Attached	

Liabilities**LIABILITIES IN EXCESS OF \$1,000:**

Name of Creditor	Address of Creditor	Amount of Liability
First Federal Bank	P.O. Box 37628 Philadelphia, PA 19101-0628	\$ 293,401.63
Vystar Credit Union	P.O. Box 75058 Chicago IL 60675-5058	\$ 58,108.29

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
City of Jacksonville	117 West Duval Street Suite 375 Jacksonville FL 32202	\$ 197,514.96

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.

Jody Phillips

Digitally signed: 06/03/2024

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Account Statement May 2024

May 1, 2024-May 31, 2024

Account Ending in ()

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Account Holdings

Cash and Cash Equivalents

Description	Interest/Dividend Paid 05/01 - 05/31	Interest/Dividend Rate ³	Current Balance
DEPOSIT CASH ACCOUNT ⁴			
Metro City Bank			\$4,241.98
TOTAL DEPOSIT CASH ACCOUNT	\$1.26	0.35%	\$4,241.98
Total Cash and Cash Equivalents			\$4,241.98

Mutual Funds, Publicly Traded Funds and Interval Funds

Visit our digital client experience to see lot level details, average cost per share, current market values and more.

Security ID / Description	Quantity Price	Market Value
BCX BLACKROCK RESOURCES & COMMODITIES STRATEGY TR	591.563 \$9.3400	\$5,525.19
DVFX DAVIS FINANCIAL CL Y _R	99.909 \$60.2200	\$6,016.51
FTSM FIRST TRUST IV ENHANCED SHORT MATURITY ETF NEW	80.118 \$59.6000	\$4,775.03
FXN FIRST TRUST ENERGY ALPHAD ETF	208.949 \$18.8900	\$3,947.04
RDVY FIRST TRUST EXCHANGE TRADED FUND VI RISING DIV ACHIEVERS ETF	105.661 \$55.2500	\$5,837.77
FXZ FIRST TRUST MATERIALS ALPHAD ETF	104.811 \$69.5100	\$7,285.41
WMFFX WASHINGTON MUTUAL INVESTORS CL F2 _R	61.395 \$61.6900	\$3,787.45
Total		\$37,174.40

^R Dividen

³ Bank Deposit Sweep interest is the current rate. Money Market Sweep dividend is a 30-day yield.

⁴ Bank Deposit Sweep Accounts are FDIC insured, are not obligations of LPL Financial or SIPC, and are not available for margin purposes. See message section for further information.

⁵ Refer to the statement message titled ESTIMATED ANNUAL INCOME (EAI) AND ESTIMATED YIELD (EY) for information on how this figure is calculated.