

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/03/2024

General Information

Name: Hon Sam Steele

PID 287186

AGENCY INFORMATION

Organization	Suborganization	Title
Monroe County	Elected Constitutional Officer	Tax Collector

CANDIDATE FOR

Position	Agency Name	Position sought or held
Tax Collector	Monroe County Tax Collector	Tax Collector

Net Worth

My Net Worth as of May 31, 2024 was \$ 366,866.72.

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 \$ 64,479.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
201 Coppitt Rd 104A, Key West, FL 33040	\$ 365,000.00
Wells Fargo Bank (Checking & Savings)	\$ 57,852.93
Gulf Atlantic Bank (Business Checking)	\$ 3,781.72
Vanguard Charlotte FDS Total INTL BD ETF (BNDX)	\$ 2,128.72
Vanguard BD Index FDS Short Trm Bond (BSV)	\$ 1,982.89
Vanguard Developed Markets Index Fund ETF (VEA)	\$ 8,309.74
Vanguard Scottsdale FDS MTG-BKD SECS ETF (VMBS)	\$ 1,165.84
Vanguard Index Funds S&P 500 ETF USD (VOO)	\$ 13,992.21
Vanguard INTL Equity Index FDS FTSE EMR MKT ETF (VWO)	\$ 2,742.54
Vanguard Extended Markets Index Fund (VXF)	\$ 2,206.10
Stock (American Airlines Group Inc)	\$ 1,258.95
Stock (Delta Airlines)	\$ 5,253.05
Stock (MasTec Inc)	\$ 6,025.25
Stock (Qualcomm Inc)	\$ 4,107.70
Stock (Qorvo Inc)	\$ 1,939.60
Stock (Royal Caribbean Cruises)	\$ 2,668.82
FRS Pension Plan	\$ 18,560.68
Empower 457 Deferred Compensation Plan	\$ 9,012.56
2022 Robalo R222 Center Console	\$ 80,000.00
2022 Coyote Vessel Trailer 880lbs	\$ 3,500.00
Stock (Norwegian Cruise Line Holdings)	\$ 1,155.90

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Kia Motors Finance	PO Box 650805, Dallas, TX 75265	\$ 15,046.87
Gulf Atlantic Bank	2222 N Roosevelt Blvd, Key West, FL 33040	\$ 202,476.94
Keys Federal Credit Union	3022 N Roosevelt Blvd, Key West, FL 33040	\$ 65,966.00

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
Monroe County Tax Collector	1200 Truman Ave, Suite 100	\$ 143,737.00
CAS Investments of KW LLC	201 Coppitt Rd 104A	\$ 28,700.00

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
CAS Investments of KW LLC	Camden Dugger (tenant)	3208 Flagler Ave, Key West, FL 33040	United States Military

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.

Sam Steele

Digitally signed: 06/03/2024

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