

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/06/2024

General Information

Name: Mr James Martin Sullivan

CONFIDENTIAL

PID 286039

AGENCY INFORMATION

Organization	Suborganization	Title
Winter Park	Community Redevelopment Agency	City Commissioner
Winter Park	Mayor And City Commission	

Net Worth

My Net Worth as of December 31, 2023 was \$ 6,029,003.00.

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 \$ 234,958.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
house {REDACTED}	\$ 1,044,966.00
{REDACTED} time share {REDACTED}	\$ 4,000.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
N/A		

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
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
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.

James Martin Sullivan

Digitally signed: 06/06/2024

Filed with COE: 06/06/2024

ASSETS as of 12/31/2023

Bank cash: Commerce Bank & Trust	\$90,322
Bank Certificate of Deposit: Commerce Bank & Trust	\$51,397
Annuity: American Funds Growth, Lincoln Financial Group	\$420,154
Cash, brokerage accounts	\$60,146
SNOXX SCHWAB TREASURY OBLIG MO	\$296,717
OMC OMNICOM GROUP INC	\$43,255
CSCO CISCO SYSTEMS INC	\$40,416
PEP PEPSICO INC	\$33,968
CFG CITIZENS FINL GROUP INC	\$26,512
DRI DARDEN RESTAURANTS	\$32,860
TIHYX TIAA-CREF HIGH-YIELD INS	\$18,478
NFFFX AMERICAN FUNDS NEW WORLD	\$12,623
CSRSX COHEN & STEERS REALTY SHARES	\$7,045
MDIJX MFS INTL DIVERSIFICATION	\$24,972
PNAIX T. ROWE PRICE ALL-CAP OPPORTUNITIES	\$30,912
VSMAX VANGUARD SMALL CAP INDEX ,	\$20,236
WSMDX WILLIAM BLAIR SMALL-MID CAP GROWTH	\$12,138
SNOXX SCHWAB TREASURY OBLIG MO	\$9,094
T A T & T INC	\$11,746
TIHYX TIAA-CREF HIGH-YIELD INS	\$245,873
NFFFX AMERICAN FUNDS NEW WORLD	\$154,384
CSRSX COHEN & STEERS REALTY SHARES	\$89,690
MDIJX MFS INTL DIVERSIFICATION	\$362,053
PNAIX T. ROWE PRICE ALL-CAP OPPORTUNITIES	\$444,940
VSMAX VANGUARD SMALL CAP INDEX ,	\$242,641
WSMDX WILLIAM BLAIR SMALL-MID CAP GROWTH	\$150,410
SNOXX SCHWAB TREASURY OBLIG MO	\$40,894
T A T & T INC	\$13,424
ABT ABBOTT LABORATORIES	\$44,028
ABBV ABBVIE INC	\$46,491
LNT ALLIANT ENERGY CORP	\$30,780
ALL ALLSTATE CORP	\$41,994
AEP AMER ELECTRIC PWR CO	\$32,488
AXP AMERICAN EXPRESS CO	\$18,734
AMGN AMGEN INC.	\$57,604
APO APOLLO GLOBAL MGMT INC N	\$37,276
BAH BOOZ ALLEN HAMILTON	\$51,164
CVX CHEVRON CORP	\$29,832
CSCO CISCO SYSTEMS INC	\$50,520
COP CONOCOPHILLIPS	\$58,035
STZ CONSTELLATION BRAND	\$36,263
COST COSTCO WHOLESALE CO	\$132,016
CVS CVS HEALTH CORP	\$31,584
DE DEERE & CO	\$39,987
D DOMINION ENERGY INC	\$23,500
DTE DTE ENERGY CO	\$22,052

ASSETS continued as of 12/31/2023

EMN EASTMAN CHEMICAL CO	\$35,928
ETN EATON CORP PLC F	\$42,144
ENB ENBRIDGE INC F	\$10,626
EOG EOG RESOURCES INC	\$6,048
ES EVERSOURCE ENERGY	\$24,688
GIS GENERAL MILLS INC	\$19,542
GPC GENUINE PARTS CO	\$27,700
HON HONEYWELL INTL INC	\$41,942
JNJ JOHNSON & JOHNSON	\$31,348
LECO LINCOLN ELEC HLDGS	\$21,746
LMT LOCKHEED MARTIN CORP	\$33,993
MMC MARSH & MC LENNAN CO	\$75,788
MDT MEDTRONIC PLC F	\$32,952
MSFT MICROSOFT CORP	\$300,832
NSC NORFOLK SOUTHERN CO	\$47,276
ORCL ORACLE CORP	\$73,801
PEP PEPSICO INC	\$50,952
PM PHILIP MORRIS INTL	\$9,408
PPG PPG INDUSTRIES INC	\$29,910
PG PROCTER & GAMBLE	\$29,308
RGA REINSURANCE GP AMER	\$36,401
SPGI S&P GLOBAL INC	\$66,078
TXN TEXAS INSTRUMENTS	\$102,276
KO THE COCA-COLA CO	\$29,465
UNH UNITEDHEALTH GRP INC	\$105,294
DIS WALT DISNEY CO	\$18,058
WMB WILLIAMS COS INC	\$13,932

INCOME 2023

		gross
JMS SSA-1099		\$41,962
1099 INT	Commerce Bank & Trust 1201 S Orlando Ave WP FL 32789	\$1,440
W-2 JMS	City of Winter Park 401 S Park Ave WP FL 32789	\$14,191
1099-R JMS Pension AT&T	Northern Trust Co. 50 S LaSalle St Chicago IL 60603	\$2,640
1099-R JMS Pension AT&T	Fidelity Inv Instit Op 100 Magellan Way Covington KY 41015	\$5,280
1099-R JMS IRA	Schwab & Co. Inc. 3000 Schwab Way, Westlake TX 76262	\$4,620
ABBVIE INC ABBV 00287Y109	1 N. Waukegan Road, North Chicago, IL 60064	\$1,776
ALLIANT ENERGY CORP LNT 018802108	4902 N Biltmore Ln, Suite 1000, Madison, WI	\$1,086
ALLSTATE CORP ALL 020002101	<u>Northfield Township, IL</u>	\$1,056
AMER ELECTRIC PWR CO AEP 025537101	1 Riverside Plaza, Columbus, OH	\$1,348
AMGEN INC. AMGN 031162100	Thousand Oaks, CA	\$1,704
CHEVRON CORP CVX 166764100	6001 Bollinger Canyon Road San Ramon, CA 94583	\$1,208
CISCO SYSTEMS INC CSCO 17275R102	170 West Tasman Dr, San Jose, CA	\$1,550
CONOCOPHILLIPS COP 20825C104	925 N Eldridge Pkwy, Houston, TX	\$2,305
DOMINION ENERGY INC D 25746U109	120 Tredegar St, Richmond, Virginia, 23219	\$1,669
EASTMAN CHEMICAL CO EMN 277432100	200 S Wilcox Dr, Kingsport, TN	\$1,264
EVERSOURCE ENERGY ES 30040W108	56 Prospect Street Hartford, Connecticut 06103	\$1,080
MARSH & MC LENNAN CO MMC 571748102	1166 Avenue of the Americas New York, NY 10036	\$1,040
MEDTRONIC PLC F MDT G5960L103	710 Medtronic Parkway, Minneapolis, MN 55432	\$1,028
MICROSOFT CORP MSFT 594918104	1 Microsoft Way, Redmond, WA	\$2,232
NORFOLK SOUTHERN CO NSC 655844108	650 W Peachtree St NW Atlanta, Georgia 30308	\$1,080
ORACLE CORP ORCL 68389X105	2300 Oracle Way Austin, Texas 78741	\$1,064
PEPSICO INC PEP 713448108	700 Anderson Hill Road, Purchase, New York 10577	\$1,449
TEXAS INSTRUMENTS TXN 882508104	12500 TI Blvd., Dallas, Texas 75243	\$3,012
UNITEDHEALTH GRP INC UNH 91324P102	Minnetonka, MN	\$1,458
OMNICOM GROUP INC OMC	195 Broadway, 8th Fl New York, NY 1000	\$1,268