

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

Filed with COE: 06/02/2024

General Information

Name: Ms Penelope P Gold

CONFIDENTIAL

PID 281263

AGENCY INFORMATION

Organization	Suborganization	Title
Longboat Key	Mayor And Town Commission	

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 N/A.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Republic Bank and Trust	\$ 14,500.00
Park Community Credit Union	\$ 17,002.59
Chase Bank	\$ 42,830.00
RW Baird Investments (see attachments)	\$ 1,648,292.00
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
Income from IRA withdrawals	RW Baird investments	\$ 90,000.00

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	
Name of Business Entity	Park Community Credit Union
Address of Business Entity	2515 Blankenbaker Pkwy, Louisville, KY 40299
Principal Business Activity	Credit Union
Postion Held with Entity	Board of Directors Member
I own more than a 5% Interest in the Business	No
Nature of my Ownership Interest	None

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?

I originally neglected to add the bank names and IRA withdrawl amount.

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.

Penelope P Gold

Digitally signed: 06/02/2024

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- This page reflects your holdings in real-time.
- Estimated annual income and yields are calculated by annualizing recent distributions and may not reflect historical experience or predict future results.
- Current values reflect 15-minute delayed prices except where indicated otherwise.
- When viewing multiple accounts, the % of Assets is the sum of market value on a position relative to the total value of all accounts selected. When a position is expanded to show the holdings in each account, the % of Assets is the value of each position relative to the total market value of the individual account.
- Option contracts are priced using the latest Bid (for long positions) and Ask (for short positions).
- Any balances reflected in this section held in a bank deposit account or in shares of money market mutual funds may be liquidated at your request and the proceeds returned to your account or remitted to you. The bank deposit interest rate paid to you is based on household account values and determined by the negotiated interest rates paid by the participating banks after deducting fees paid to a third party for administering the cash sweep program and the compensation to Baird for offering and providing various services related to the program. Please visit www.rwbaird.com/cashsweepcomp and www.rwbaird.com/cashsweeps to learn more about Baird's compensation and the cash sweep program. There are several alternatives to consider regarding your idle cash, including those with a higher yield, and we encourage you to discuss them with your Financial Advisor.

Help

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It's an easy-to-access smartphone application that puts your Baird accounts in the palm of your hand.

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Site Disclosure

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Symbol		Security Name	Asset Classification	Quantity	Price	Price Change	Value Change	Value	% of Assets	Annual Income	Est. Yield	
⊕	▼ VSCSX	VNGRD S/TRM CORP BD ADML	Fixed Income	900.635	\$20.93	\$0.00	0.00%	\$0.00	\$18,850.29	1.14%	\$643.05	3.41%
⊞	▼ VSOIX	VICTORY SYCA SMCO OPP I	Equities	860.156	\$48.81	\$0.00	0.00%	\$0.01	\$41,984.21	2.55%	\$300.97	0.72%
Account		Account Name	Account Type	Quantity	Price	Price Change	Daily Value Change	Value	% of Assets			
▼	█	GOLD █ IRA	Cash	468.598			\$0.01	\$22,872.27		3.78%		
▼	█	GOLD PENNY IRA	Cash	391.558			\$0.01	\$19,111.95		2.82%		
⊕	▼ VVIAX	VNGRD VAL IDX ADML	Equities	3,315.625	\$62.85	\$0.00	0.00%	\$0.01	\$208,387.03	12.64%	\$4,967.47	2.38%
⊕	▼ WCMIX	WCM FOC INTL GRW I	Equities	1,951.942	\$25.07	\$0.00	0.00%	\$0.01	\$48,935.19	2.97%	\$23.03	0.05%
Totals									\$0.23	\$1,648,291.64		

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Symbol	Security Name	Asset Classification	Quantity	Price	Daily \$		Daily Value	Value	% of Assets	Est. Annual Income	Est. Yield
					Price Change	Price Change					
⊕	Fdic Insur...	Cash and Cash Equivalents*	68,619.07	\$1.00				\$68,619.07	4.16%	N/A	N/A
⊕	▼ APHFX	ARTISAN HI INC I	1,057,034	\$8.92	\$0.00	0.00%	\$0.00	\$9,428.74	0.57%	\$726.71	7.71%
⊕	▼ APHKX	ARTISAN INTL VAL I	1,200,976	\$49.63	\$0.00	0.00%	\$0.01	\$59,604.44	3.62%	\$705.45	1.18%
⊕	▼ BCOIX	BAIRD COR PLS BD I	3,142,661	\$9.93	\$0.00	0.00%	\$0.00	\$31,206.62	1.89%	\$1,192.33	3.82%
⊕	▼ BSBIX	BAIRD SHT TRM BD I	2,424,457	\$9.37	\$0.00	0.00%	\$0.00	\$22,717.16	1.38%	\$858.50	3.78%
⊕	▼ BUBIX	BAIRD ULTRA SHT BD I	938,112	\$10.09	\$0.00	0.00%	\$0.00	\$9,465.55	0.57%	\$483.69	5.11%
⊕	▼ CCALX	CONESTOGA SMCP I	559.14	\$71.85	\$0.00	0.00%	\$0.01	\$40,174.21	2.44%	N/A	N/A
⊕	▼ CLMZX	COLUMBIA MTG OPP I	1,206,415	\$7.79	\$0.00	0.00%	\$0.00	\$9,397.97	0.57%	\$629.87	6.70%
⊕	▼ DODIX	DODGE & COX INC I	10,321,888	\$12.38	\$0.00	0.00%	\$0.02	\$127,784.97	7.75%	\$5,222.88	4.09%
⊕	▼ FIQIX	FID ADVS INTL SMCP Z	613,339	\$33.01	\$0.00	0.00%	\$0.01	\$20,246.32	1.23%	\$385.18	1.90%
⊕	▼ FLCOX	FID LGCP VAL IDX IPRM	92,249	\$17.40	\$0.00	0.00%	\$0.00	\$1,605.13	0.10%	\$29.61	1.84%

Symbol	Security Name	Asset Classification	Quantity	Price Change	Price Change	Value Change	Value	% of Assets	Annual Income	Est. Yield
⊕	Accrued Interest	Cash and Cash Equivalents*					\$17.17	0.00%	N/A	N/A
⊕	Cash	Cash and Cash Equivalents*					\$24,000.00	1.46%	N/A	N/A