

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/05/2024

General Information

Name: Hon James E. Boyd

PID 234993

AGENCY INFORMATION

Organization	Suborganization	Title
Senate	Elected Constitutional Officer	State Senator, District 20

Net Worth

My Net Worth as of December 31, 2023 was \$ 14,977,755.00.

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 \$ 275,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Residence 1125 59th St. NW Bradenton, FL 34209	\$ 2,100,000.00
Investment Property 717 Manatee Ave. W. Bradenton, FL 34205	\$ 1,850,000.00
Life Insurance, Lincoln Life/Cash value, P.O. Box 515 Concord, NH 03302	\$ 25,000.00
Money Market Acct, South State Bank, 3410 8th Ave. W. Palmetto, FL 34221 Bank,	\$ 270,500.00
401K Bluestar Retirement Services, P.O. Box 2349 Ponte Verde, FL 32082 - Self Directed	\$ 1,216,534.00
Florida Retirement System retirement fund 2020	\$ 12,721.00
Boyd Insurance & Investment Services, Inc 717 Manatee Ave. W. Bradenton, FL 34205	\$ 10,500,000.00
The Boyd Group, Inc. / Real Estate Brokerage, 717 Manatee Ave. W. Ste. 300 Bradenton, FL 34205	\$ 25,000.00
Affinity Surety Group, LLC 717 Manatee Ave. W. Bradenton, FL 34205	\$ 75,000.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Crews Bank	400 N Brevard Ave. Arcadia, FL 34266	\$ 1,025,000.00

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

Name of Creditor	Address of Creditor	Amount of Liability
Bank United	1575 S. Tamiami Tr. Sarasota, FL 34230	\$ 347,000.00

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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
Boyd Insurance	717 Manatee Ave. W. Ste.300 Bradenton, FL 34205	\$ 1,018,728.00
The Boyd Group	717 Manatee Ave. W. Ste. 300 Bradenton, FL 34205	\$ 5,000.00
Sunz Insurance	1301 6th Ave. W. Bradenton, FL 34205	\$ 10,000.00
State of FL	404 S. Monroe, St. Tallahassee, FL 32399	\$ 29,697.00

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
Affinity Surety Group	LLC	717 Manatee Ave. W. Ste.300, Bradenton, FL 34205	Surety Services
Sunz Insurance	WC Company	1301 6th Ave. W. Bradenton, FL	Insurance Company

Interests in Specified Businesses

Business Entity # 1	
Name of Business Entity	Boyd Insurance & Investment Services, Inc.
Address of Business Entity	717 Manatee Ave. W. Ste.300, Bradenton, FL 34205
Principal Business Activity	Insurance Agency
Postion Held with Entity	Chairman
I own more than a 5% Interest in the Business	Yes
Nature of my Ownership Interest	Stock

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 E. Boyd

Digitally signed: 06/05/2024

Filed with COE: 06/05/2024

YOUR ACCOUNT STATEMENT

James Boyd
1125 59th St. NW
BRADENTON, FL 34209

Statement Period 01/01/2023 to 12/31/2023

**Boyd Insurance & Investment Services, Inc. 401(k)
Profit Sha**

ACCOUNT SUMMARY

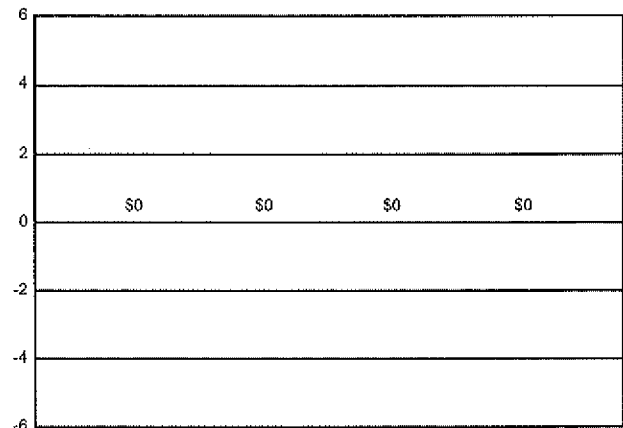
Beginning Balance		\$987,716.10
	Your Contributions	\$29,833.34
	Safe Harbor Match	\$8,640.00
	Transfers	\$0.00
	Withdrawals	\$0.00
	Expenses	\$-4,203.80
	Gain/Loss	\$194,548.65
Ending Balance		\$1,216,534.29
Ending Vested Balance		\$1,216,534.29

YOUR RETIREMENT READINESS METER

Your Current Account Balance: \$1,216,534.29
Your Current Age: 67

To close your gap, you'll need to contribute this amount each month until retirement.....

If you want this much each year in retirement	You'll need this much when you retire	Your current account balance is projected to be worth this much when you retire	Your Retirement Savings Gap
\$25,000	\$399,569	\$1,742,131	No Gap! Way to go.
\$50,000	\$799,138	\$1,742,131	No Gap! Way to go.
\$75,000	\$1,198,708	\$1,742,131	No Gap! Way to go.
\$100,000	\$1,598,277	\$1,742,131	No Gap! Way to go.



These calculations assume: (a) a retirement spanning ages 73 to 93, (b) a 6% average annual return during your working years, and (c) a 4% annual return during your retirement years.

If you want this much each year in retirement.....

SOURCE SUMMARY

Contribution Source	Beginning Balance	Contributions	Transfers	Withdrawals	Gain/Loss*	Ending Balance	Vested %	Vested Balance
Your Contributions	\$619,085.06	\$29,833.34	\$0.00	\$0.00	\$119,814.79	\$768,733.19	100%	\$768,733.19
Match	\$4,283.56	\$0.00	\$0.00	\$0.00	\$811.08	\$5,094.64	100%	\$5,094.64
Profit Sharing	\$71,296.10	\$0.00	\$0.00	\$0.00	\$13,495.51	\$84,791.61	100%	\$84,791.61
Unrelated Rollover	\$169,849.53	\$0.00	\$0.00	\$0.00	\$32,150.60	\$202,000.13	100%	\$202,000.13
Safe Harbor Match	\$123,201.85	\$8,640.00	\$0.00	\$0.00	\$24,072.87	\$155,914.72	100%	\$155,914.72
Totals	\$987,716.10	\$38,473.34	\$0.00	\$0.00	\$190,344.85	\$1,216,534.29		\$1,216,534.29

YOUR INVESTMENTS SUMMARY**

Fund Name	Beginning Balance	Contributions	Transfers	Withdrawals	Gain/Loss*	Ending Balance	% of Holdings	Ending Shares	Share Price
Fidelity International Index Fund (FSPSX)	\$97,200.45	\$3,847.33	\$0.00	\$0.00	\$17,666.92	\$118,714.70	9.76%	2,507.17	\$47.35
JPMorgan Large Cap Growth Fund (R6) (JLGMX)	\$236,108.05	\$9,618.34	\$0.00	\$0.00	\$82,861.44	\$328,587.83	27.01%	5,205.76	\$63.12
JPMorgan SmartRetirement Blend 2030 (R6) (JRBYX)	\$439,481.06	\$17,313.01	\$0.00	\$0.00	\$66,600.34	\$523,394.41	43.02%	21,627.87	\$24.20
Vanguard Equity Income Fund (Adm) (VEIRX)	\$122,538.40	\$3,847.33	\$0.00	\$0.00	\$9,280.79	\$135,666.52	11.15%	1,609.90	\$84.27
International Growth Fund II Class RI (WAAADX)	\$92,388.14	\$3,847.33	\$0.00	\$0.00	\$13,935.36	\$110,170.83	9.06%	9,015.62	\$12.22
Totals	\$987,716.10	\$38,473.34	\$0.00	\$0.00	\$190,344.85	\$1,216,534.29	100.00%		

IMPORTANT MESSAGES

To help achieve long-term retirement security, you should give careful consideration to the benefits of a well-balanced and diversified investment portfolio. Spreading your assets among different types of investments can help you achieve a favorable rate of return, while minimizing your overall risk of losing money. This is because market or other economic conditions that cause one category of assets, or one particular security, to perform very well often cause another asset category, or another particular security, to perform poorly. If you invest more than 20% of your retirement savings in any one company or industry, your savings may not be properly diversified. Although diversification is not a guarantee against loss, it is an effective strategy to help you manage investment risk. In deciding how to invest your retirement savings, you should take into account all of your assets, including any retirement savings outside of the Plan. No single approach is right for everyone because, among other factors, individuals have different financial goals, different time horizons for meeting their goals, and different tolerances for risk. It is also important to review periodically your investment portfolio, your investment objectives, and the investment options under the Plan to help ensure that your retirement savings will meet your retirement goals. Fund details by contribution source (e.g. employee deferrals, employer contributions, etc.) are available online at www.myplanconnection.com. If your Plan account includes holdings in a Self-Directed Brokerage Account, holdings details are available from your brokerage statement. For more information on investing and account diversification, please visit the Department of Labor's website at www.dol.gov/ebsa/investing.html.

Please review the information contained in this statement. Notify Ameritas in writing within 30 days if you think any of the data is incorrect. BlueStar Retirement Services is not responsible for losses that arise if you do not contact us in a timely manner.

Data regarding self-directed brokerage accounts is reflected as of the most recent date such data was received from the self-directed brokerage account custodian. Please consult your self-directed brokerage account statement.

For information on plan imposed restrictions or limitations on investment direction and Social Security integration (if applicable), see your Plan Highlights. To review your Plan Highlights, login to your account via www.myplanconnection.com, and select "Enrollment Toolbox".

Federal law allows you to contribute up to \$23,500 into your retirement savings plan in 2024 on a pre-tax or Roth basis. If you are 50 or more years of age, you can also contribute an additional "catch-up" contribution of \$7,500, for a total contribution of \$30,500.

Rate of Return Calculation: Period Rate of Return = (Ending Balance - Beginning Balance - Total Cash Flow for Period)/(Beginning Balance + Time Weighted Cash Flow for Period), where Time Weighted Cash Flow = Individual Cash Flow*(# Days Invested/Total Days in Period); For purposes of this calculation, "Beginning Balance" and "Ending Balance" do not include amounts held in a self-directed brokerage account. Rates of return are not calculated if the beginning balance for the period is \$0.00.

* Includes expenses.

IMPORTANT MESSAGES

(continued)

** Please read each investment option's prospectus and consider the objectives, risks, charges, and expenses of the investment option carefully before investing. Please be aware that several investment options have implemented policies to discourage short-term trading and market timing. These policies include assessing short-term redemption fees on sale transactions. To access prospectuses, fund family internet links, and trading fee information, login to your account via www.myplanconnection.com, select "Investment Profiles", and click the "View Prospectus" icon listed with each investment option.

Performance data shown is historical and does not guarantee future results. The investment return and principal value of an investment will fluctuate so that an investor's shares, when redeemed, may be worth more or less than their original cost. An investment in mutual funds is subject to market risk and an investor may experience loss of principal. Because the value of your investment will fluctuate with market conditions, you should consider your ability to continue to invest during periods of low price levels. Regular investing does not guarantee a profit or protect against a loss in a declining market.

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