# 2023 Form 6 - Full and Public Disclosure of Financial Interests

**Filed with COE: 06/10/2024**

## General Information

Name: Roberta Ulrich

**PID 295266**

### AGENCY INFORMATION

| Organization | Suborganization | Title |
|---|---|---|
| East Central Florida Regional Planning Council | ECFRPC Council Board | Commissioner |
| Sumter County | Elected Constitutional Officer | County Commissioner |

## Net Worth

My Net Worth as of December 31, 2023 was $ 1,268,352.00.

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## 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 $ 269,750.00.

ASSETS INDIVIDUALLY VALUED AT OVER $1,000:

| Description of Asset | Value of Asset |
|---|---|
| 2359 Pawleys IslandPath, The Villages, FL 32162 | $ 740,700.00 |
| Citizens First Bank Checking Account | $ 14,763.00 |
| Citizens First Bank Savings Account | $ 3,584.00 |
| USAA Federal Savings Bank | $ 13,804.00 |
| USAA Flexible Retirement Annuity | $ 221,274.00 |
| Charles Schwab Contributory IRA | $ 98,471.00 |
| Charles Schwab Cash & Money Market Fund | $ 180,323.00 |

## Liabilities

LIABILITIES IN EXCESS OF $1,000:

| Name of Creditor | Address of Creditor | Amount of Liability |
|---|---|---|
| Rocket Mortgage | 1050 Woodward Ave. Detroit MI 48226 | $ 274,317.00 |

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

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

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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 |
|---|---|---|
| Social Security Administration | PO Box 67620 Wilkes-Barre PA 18767 | $ 14,374.00 |
| Office of Personnel Management | PO Box 45 Boyers PA 16017 | $ 56,112.00 |
| Charles Schwab Contributory IRA | 211 Main Street San Francisco CA 94105 | $ 4,011.00 |
| Sumter Board of Commissioners | PO Box 247 Bushnell FL 33513 | $ 69,118.00 |

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 |
|---|
| N/A |

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## 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.

***Roberta Ulrich***

Digitally signed: **06/10/2024**

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