

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/11/2024

General Information

Name: Hon Jan Shackelford

CONFIDENTIAL

PID 14304

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (1St)	Elected Constitutional Officer	Circuit Judge

Net Worth

My Net Worth as of December 31, 2023 was \$ 3,474,100.00.

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 \$ 150,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Residence{REDACTED}	\$ 550,000.00
Lake House{REDACTED}	\$ 300,000.00
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

Based on the office or position you hold, the certification of training required under Section 112.3142, F.S., is not applicable to you 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.

Jan Shackelford

Digitally signed: 06/11/2024

Filed with COE: 06/11/2024

JAN SHACKELFORD-Form 6-Part B-Assets

Part B: Intangible Assets as of December 31, 2023

Bank Accounts

Bank of America -Checking Account	\$ 25,400	
Regions Bank		
Money Market	\$ 4,100	
Money Market	\$ 8,800	
Checking Account	\$ 7,000	
Checking Account	\$ 4,400	
Checking Account	\$ 3,700	
Members First Checking	\$ 1,600	
<u>Total – Checking and MMA</u>		<u>\$ 55,000</u>

Securities

VirtusAllianz IRA	
Vrts NFJ Mid-Cap Value-A	<u>\$165,100</u>

Charles Schwab (Multiple Accounts)

Schwab One Account (JS)		
Cash		\$4,000
Amazon	\$ 3,000	
AT & T	\$ 9,900	
Boeing	\$ 44,300	
Dell	\$ 3,800	
Generac	\$ 5,200	
Microsoft	\$ 3,800	
<i>Total Equities</i>		\$70,000
<u>Total Schwab One Account</u>		<u>\$74,000</u>

Schwab One Account (GB)		
Cash		\$ 2,300
Boeing	\$ 13,000	
Dell	\$ 1,500	
Lam Research	\$ 800	
<i>Total Equities</i>		\$ 15,300
<u>Total Schwab One Account</u>		<u>\$ 17,600</u>

Benjamin Edwards (Multiple Accounts)

Cash/Bank Deposits	\$ 6,200
Southern Company Stock	\$ 49,300
American Capital World Growth (A)	\$114,900
America Capital World Growth F-1	\$ 35,900
Franklin Income Fund	\$125,000

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American Growth Fund of America	\$147,700		
American New Perspective	\$ 67,400		
Cybersecurity ETF	\$ 10,800		
Cloud Computing ETF	\$ 10,200		
<i>Sub Total Acct 600</i>		\$567,400	
529 Plan (IJB)			
American Capital World Growth	\$ 4,500		
<i>Sub Total</i>		\$ 4,500	
529 Plan (TJB)			
American Capital World Growth	\$ 9,000		
American Growth Fund of American	\$ 9,100		
<i>Sub Total</i>		\$ 18,100	
Individual IRA			
American Growth Fund A	\$ 23,500		
<i>Sub Total IRA</i>		\$ 23,500	
<u>Total Benjamin Edwards Accts.</u>			<u>\$613,500</u>

State of Florida-Deferred Comp Plan through Nationwide

<u>Fixed Account</u>	\$300,000		
Fid Contra	\$131,600		
Vanguard	\$149,700		
T Rowe New Horizons	\$108,300		
<i>Nationwide subtotal</i>		\$689,600	
<u>Charles Schwab-Self Directed</u>			
Cash	\$ 26,600		
Adobe	\$ 6,000		
Alphabet	\$ 7,000		
Block	\$ 3,900		
Blue Bird Corp	\$ 700		
Chipotle Mexican	\$ 11,400		
Dell	\$ 7,600		
ELF Beauty	\$ 3,600		
Meta	\$ 7,100		
<i>Subtotal Self Directed</i>		\$ 73,900	
<u>Total Deferred Comp Plan</u>			<u>\$763,500</u>

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UBS

Cash	\$ 300	
Abbvie	\$ 10,400	
Alphabet Inc	\$ 31,000	
Amazon	\$ 36,600	
Apollo Global	\$ 18,700	
Apple Inc	\$ 42,600	
Blackstone	\$ 13,400	
Broadcom	\$ 29,000	
Chevron Corp	\$ 20,300	
Constellation Brands	\$ 9,700	
Costco	\$ 11,200	
Crowdstrike	\$ 11,500	
Danaher	\$ 8,600	
Home Depot	\$ 15,900	
Honeywell	\$ 10,100	
Inuit	\$ 10,000	
Lam Research	\$ 8,600	
Marvell Technology	\$ 18,600	
Mastercard Inc	\$ 12,400	
McDonalds	\$ 11,900	
Meta	\$ 17,000	
Microsoft	\$ 39,900	
Morgan Stanley	\$ 700	
Nextera	\$ 7,500	
Nvida	\$ 26,200	
Palo Alto Networks	\$ 2,700	
RTX	\$ 12,600	
Salesforce Com	\$ 19,200	
ServiceNow	\$ 5,700	
Tesla	\$ 7,000	
Thermo Fisher	\$ 12,700	
United Health Group	\$ 20,500	
Visa	\$ 22,100	
<i>Stock Holdings & cash</i>		\$524,600
Calvert Equity	\$ 1,500	
Janus Henderson	\$ 8,300	
Transamerica Capital	\$ 30,900	
Value Line	\$ 16,900	
Capital Group Fixed Income	\$ 8,600	
First Trust	\$ 10,400	
Money Market Cash alternatives	\$ 44,400	

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Allspring	\$ 700		
Aristotle	\$ 10,700		
Bramshill Multi-Strategy	\$ 10,200		
Eaton Vance Short	\$ 18,700		
Eaton Vance Short	\$ 10,900		
Eaton Vance Floating	\$ 700		
Hartford Short	\$ 11,500		
Pimco Income	\$ 10,700		
Putnam Ultra	\$ 11,600		
First Trust Merger Arbitrage	\$ 15,100		
Pioneer	\$ 4,000		
<i>Subtotal other Equities, etc.</i>		\$225,800	
<u>Total UBS Acct</u>			<u>\$750,400</u>

Total Intangible Assets	\$2,439,100
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Jan Shackelford-Income

Part D: Income Over \$1000 in 2023

1. State of Florida State Court System 200 E. Gaines St. Tallahassee, FL 32399	Annual Salary (eff. 7/1/23)	\$191,163.00
2. Virtus Mutual Funds (f/k/a) Allianz) P.O. Box 9874 Providence, RI 02940-8074	RMD	\$5,315
3. Benjamin Edwards & Co. Pershing LLC One Pershing Plaza Jersey City, NJ 07399		
American Capital Growth	LTCG	\$1,765
American Growth Fund	LTCG	\$9,357
American New Perspective	LTCG	\$2,825
Southern Company	Dividends	\$1,954
4. Charles Schwab & Co. (Two Accounts) 3000 Schwab Way Westlake, TX 76262		
Allegro Microsystems	STCG	\$1,364
Boeing	STCG	\$1,002
Nvidia Corp	STCG	\$1,385
Celestia Inc	STCG	\$1,474
Marriott Intl	STCG	\$1,134
Marriott Intl	LTCG	\$3,518
Marriott Intl	LTCG	\$2,029
Microsoft	LTCG	\$2,760
Microsoft	LTCG	\$1,362
5. UBS Financial Services 1285 Avenue of the Americas New York, NY 10019		
Home Depot	LTCG	\$1,010
Eaton Vance	Dividends	\$1,068

Key

LTCG=	Long Term Capital Gain
RMD=	Required Minimum Distribution from Inherited IRA
STCG=	Short Term Capital Gain