2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/12/2024

General Information

Name: Hon David Morgan

CONFIDENTIAL

PID 6496

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (19Th)	Elected Constitutional Officer	Senior/Retired Judge
Judicial Senior Judges	Consent to be Assigned	

Net Worth

My Net Worth as of December 31, 2023 was $ 2,772,250.00.

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
Schwab Brokerage (Cash)	$ 428,840.77
Bank Accounts (TD Bank)	$ 53,581.05
American Funds US Govt Money Market	$ 32,937.90

Filed with COE: 06/12/2024

Description of Asset	Value of Asset
Schwab Brokerage - Amazon.com, Inc	$ 15,194.00
Bank Account (Schwab)	$ 11,219.95
AIR PRODUCTS & CHEMICALS INCORPORATED	$ 4,107.00
ALLSTATE CORPORATION	$ 3,639.48
ALPHABET INCORPORATED CAP STK CLASS A	$ 8,241.71
Amazon.com Inc.	$ 5,469.84
APPLE INCORPORATED	$ 16,557.58
BROADCOM INCORPORATED	$ 11,162.50
CHUBB LIMITED (SWITZERLAND)	$ 6,780.00
Cisco Systems	$ 5,254.08
CME GROUP INCORPORATED	$ 5,054.40
COMCAST CORPORATION NEW CLASS A	$ 4,735.80
COSTCO WHOLESALE CORPORATION NEW	$ 3,300.40
DARDEN RESTAURANTS INCORPORATED	$ 3,286.00
DEVON ENERGY CORPORATION NEW	$ 8,380.50
DIAMONDBACK ENERGY INCORPORATED	$ 3,877.00
EATON CORPORATION PLC SHS (IRELAND)	$ 6,261.32
EDWARDS LIFESCIENCES CORPORATION	$ 5,718.75
HALLIBURTON COMPANY	$ 5,603.25
INTERCONTINENTAL EXCHANGE INCORPORATED	$ 4,880.34
IQVIA HLDGS INCORPORATED	$ 5,321.74
JOHNSON & JOHNSON	$ 4,702.20
JPMORGAN CHASE & COMPANY	$ 8,845.20
JPMORGAN LIQUID ASSETS MONEY MARKET FD CAPITAL CL M/M	$ 1,164,000.00
L3HARRIS TECHNOLOGIES INCORPORATED	$ 5,265.50
LOCKHEED MARTIN CORPORATION	$ 3,172.68
LOWES COMPANIES INCORPORATED	$ 11,350.05
MARATHON PETE CORPORATION	$ 5,934.40

Filed with COE: 06/12/2024

Description of Asset	Value of Asset
MEDTRONIC PLC SHS (IRELAND)	$ 3,542.34
MERCK & COMPANY INCORPORATED	$ 6,105.12
MICROSOFT CORPORATION	$ 15,793.68
MOTOROLA SOLUTIONS INCORPORATED COM NEW	$ 5,948.71
NXP SEMICONDUCTORS N V (NETHERLANDS)	$ 5,512.32
S&P GLOBAL INCORPORATED	$ 3,524.16
SALESFORCE INCORPORATED	$ 5,262.80
THERMO FISHER SCIENTIFIC INCORPORATED	$ 2,653.95
TJX COMPANIES INCORPORATED NEW	$ 5,065.74
TRANE TECHNOLOGIES PLC SHS (IRELAND)	$ 5,121.90
TRUIST FINL CORPORATION	$ 1,587.56
UNION PAC CORPORATION	$ 6,631.74
UNITEDHEALTH GROUP INCORPORATED	$ 6,844.11
VERIZON COMMUNICATIONS INCORPORATED	$ 4,486.30
VISA INCORPORATED COM CLASS A	$ 7,029.45
WALMART INCORPORATED	$ 4,729.50
ZOETIS INCORPORATED CLASS A	$ 4,144.77
-Cash-	$ 9,776.76
Home - {REDACTED}	$ 748,630.00

Filed with COE: 06/12/2024

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		

Filed with COE: 06/12/2024

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
Florida Retirement System	PO Box 9000, Tallahassee, FL 32315	$ 114,901.14
Nationwide Retirement Solutions	P. O. Box 182797, Columbus, OH 43218	$ 36,000.00
Social Security Administration	Washington, DC	$ 35,553.60
State of Florida	200 E Gaines St., Tallahassee, FL 32399	$ 5,500.00
Charles Schwab & Co	3000 Schwab Way, Westlake, TX 76262	$ 1,199.35

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

Filed with COE: 06/12/2024

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.

David Morgan

Digitally signed: **06/12/2024**

Filed with COE: 06/12/2024