

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/12/2024

General Information

Name: Hon Jeffrey Dana Gillen

CONFIDENTIAL

PID 70703

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (15Th)	Elected Constitutional Officer	Circuit Judge

Net Worth

My Net Worth as of December 31, 2023 was \$ 4,170,753.00.

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
personal residence	\$ 1,881,569.00
timber/hunting property, Columbia County, Florida	\$ 80,000.00
Durkee Lakes, Inc., Oscoda County, MI	\$ 176,800.00
Rockefeller (investments)	\$ 657,274.00
Merrill Lynch (cash and cash equivalents)	\$ 442,428.00
Rockefeller IRA & Merrill Lynch IRA	\$ 38,543.00
FRS	\$ 781,173.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
U.S. Bank, FL, Metro-Ind. (Tesla loan)	P.O. Box 790179, St. Louis, MO 63179	\$ 37,034.00

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
State of Florida	Tallahassee	\$ 184,451.52
Social Security	Social Security Administration, Washington, D.C.	\$ 52,891.00

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

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.

Jeffrey Dana Gillen

Digitally signed: 06/12/2024

Filed with COE: 06/12/2024

Statement for the Period December 1, 2023 to December 31, 2023

JEFFREY D GILLEN & [REDACTED] - Joint WROS
Account Number: [REDACTED]

Separate Acct Manager: ROCKEFELLER CAPITAL MANAGEMENT
Investment Discipline: ADVISORY MODEL PORTFOLIO

ROCKEFELLER CAPITAL MANAGEMENT

BROKERAGE SERVICES PROVIDED BY ROCKEFELLER FINANCIAL LLC, MEMBER FINRA, SIPC,
AND A WHOLLY OWNED SUBSIDIARY OF ROCKEFELLER CAPITAL MANAGEMENT LP

Holdings

NFS-provided cost basis, realized gain (loss) and holding period information may not reflect all adjustments necessary for tax purposes. Please refer to Footnotes and Cost Basis Information at the end of this statement for more information.

For additional information regarding your holdings, please refer to the footnotes at the end of the statement.

CASH AND CASH EQUIVALENTS - 1.39% of Total Account Value

Description	Symbol/Cusip Account Type	Quantity	Price on 12/31/23	Current Market Value	Estimated Annual Income
Bank Deposits					
Bank deposits are not securities and are not covered by the Securities Investor Protection Corporation (SIPC). Funds used to purchase or sweep to a bank deposit are SIPC protected until deposited to a Program Bank at which time funds may be eligible for FDIC insurance. Customers are responsible for monitoring their total deposits at each Program Bank to determine the extent of available FDIC insurance. Refer to the Bank Deposit Detail section which appears later in this statement for information on the banks holding your deposits. If your account was established on the last business day of this month, your statement will not include a Bank Deposit Detail section. The interest rate below is the interest rate effective for Cash Balances in your FDIC-insured Bank Deposit Sweep on the last day of the statement period.					
BANK DEPOSIT SWEEP PROGRAM	QPRMQ CASH	9,159.2	\$1.00	\$9,159.20	
Total Cash and Cash Equivalents				\$9,159.20	

HOLDINGS > EXCHANGE TRADED PRODUCTS - 98.61% of Total Account Value

Description	Symbol/Cusip Account Type	Quantity	Price on 12/31/23	Current Market Value	Estimated Annual Income	Original/Adjusted Cost Basis	Unrealized Gain (Loss)
Equity							
INVESCO EXCHANGE TRADED FD TR LARGE CAP VALUE Estimated Yield 2.15%	PWV CASH	1,348	\$50.74	\$68,397.52	\$1,475.20		
ISHARES CORE S&P 500 ETF Estimated Yield 1.44%	IVV CASH	176	\$477.63	\$84,062.88	\$1,214.18		
SCHWAB US DIVIDEND EQUITY ETF Estimated Yield 3.49%	SCHD CASH	423	\$76.13	\$32,202.99	\$1,124.33		
SPDR S&P500 ETF TRUST TRUST UNIT DEPOSITARY RECEIPT Estimated Yield 1.39%	SPY CASH	162	\$475.31	\$77,000.22	\$1,074.68		

Account carried with National Financial Services LLC, Member
NYSE, SIPC

Statement for the Period December 1, 2023 to December 31, 2023

JEFFREY D GILLEN & [REDACTED] - Joint WROS
Account Number: [REDACTED]

Separate Acc't Manager: ROCKEFELLER CAPITAL MANAGEMENT
Investment Discipline: ADVISORY MODEL PORTFOLIO

ROCKEFELLER

CAPITAL MANAGEMENT

BROKERAGE SERVICES PROVIDED BY ROCKEFELLER FINANCIAL LLC, MEMBER FINRA, SIPC,
AND A WHOLLY OWNED SUBSIDIARY OF ROCKEFELLER CAPITAL MANAGEMENT LP

HOLDINGS > EXCHANGE TRADED PRODUCTS *continued*

Description	Symbol/Cusip Account Type	Quantity	Price on 12/31/23	Current Market Value	Estimated Annual Income	Original/Adjusted Cost Basis	Unrealized Gain (Loss)
SPDR S&P500 ETF TRUST TRUST UNIT Next Dividend Payable: 01/31/24	SPY	<i>continued</i>					
SPDR SER TR S&P DIVID ETF Estimated Yield 2.63%	SDY CASH	449	\$124.97	\$56,111.53	\$1,480.86		
VANGUARD INDEX FDS VANGUARD GROWTH ETF FORMERLY VANGUARD INDEX TR VIPERS Estimated Yield 0.58%	VUG CASH	521	\$310.88	\$161,968.48	\$938.84		
VANGUARD S&P 500 VALUE INDEX FUND Estimated Yield 1.68%	VOOV CASH	252	\$167.96	\$42,325.92	\$714.24		
VANGUARD SPECIALIZED FUNDS DIV APP ETF Estimated Yield 1.88%	VIG CASH	202	\$170.40	\$34,420.80	\$648.04		
Total Equity				\$556,490.34	\$8,670.37		
Fixed Income							
ISHARES CORE US AGGREGATE BOND ETF Estimated Yield 3.13%	AGG CASH	719	\$99.25	\$71,360.75	\$2,234.34		
Other							
SPDR GOLD TR GOLD SHS	GLD CASH	106	\$191.17	\$20,264.02			
Total Exchange Traded Products				\$648,115.11	\$10,904.71		
Total Securities				\$648,115.11	\$10,904.71		
TOTAL PORTFOLIO VALUE				\$657,274.31	\$10,904.71		

Account carried with National Financial Services LLC, Member
NYSE, SIPC

Statement for the Period January 1, 2024 to January 31, 2024

JEFFREY D GILLEN - Premiere Select IRA BDA
Account Number: [REDACTED]

Separate Acc't Manager: ROCKEFELLER CAPITAL MANAGEMENT
Investment Discipline: ADVISORY MODEL PORTFOLIO

ROCKEFELLER

CAPITAL MANAGEMENT

BROKERAGE SERVICES PROVIDED BY ROCKEFELLER FINANCIAL LLC, MEMBER FINRA, SIPC,
AND A WHOLLY OWNED SUBSIDIARY OF ROCKEFELLER CAPITAL MANAGEMENT LP

Account Overview

CHANGE IN ACCOUNT VALUE	Current Period	Year-to-Date
BEGINNING VALUE	\$37,590.27	\$37,590.27
Additions and Withdrawals	\$154.62	\$154.62
Misc. & Corporate Actions	\$0.00	\$0.00
Income	\$2.81	\$2.81
Taxes, Fees and Expenses	\$0.00	\$0.00
Other Activity	\$95.00	\$95.00
Change in Value	\$495.49	\$495.49
ENDING VALUE (AS OF 01/31/24)	\$38,338.19	\$38,338.19

Refer to Miscellaneous Footnotes for more information on Change in Value.

RETIREMENT CONTRIBUTIONS/DISTRIBUTIONS

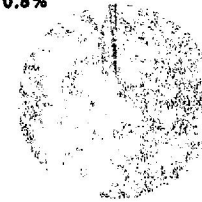
CONTRIBUTIONS	Current Period	Year-to-Date
For Current Year 2024	\$0.00	\$0.00
For Prior Year 2023	\$0.00	\$0.00
DISTRIBUTIONS		
For Current Year 2024	\$0.00	\$0.00

INCOME	Current Period	Year-to-Date
Dividends	\$2.81	\$2.81
TOTAL INCOME	\$2.81	\$2.81

All income is tax deferred until it is distributed from the account.

ACCOUNT ALLOCATION

Bank Deposits 0.6%
Other 0.8%



Equities 98.6%

	Percent	Prior Period	Current Period
Cash	0.0 %	(\$3.27)	\$0.00
Bank Deposits	0.6	\$0.00	\$249.16
Equities	98.6	\$37,273.06	\$37,783.99
Other	0.8	\$320.48	\$305.04
TOTAL	100.0 %	\$37,590.27	\$38,338.19

Other holdings are infrequently traded instruments or other securities which are not easily categorized.

Account Allocation shows the percentage that each asset class represents of your total account value. Account Allocation for equities, fixed income, and other categories may include mutual funds and may be net of short positions. NFS has made assumptions concerning how certain mutual funds are allocated. Closed-end mutual funds and Exchange Traded Products (ETPs) listed on an exchange may be included in the equity allocation. The chart may not reflect your actual portfolio allocation. Consult your broker/dealer prior to making investment decisions.