

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/24/2024

General Information

Name: Mr Michael Jude Grant

PID 95191

AGENCY INFORMATION

Organization	Suborganization	Title
House Of Representatives	Elected Constitutional Officer	State Representative

Net Worth

My Net Worth as of March 31, 2024 was \$ 14,035,213.00.

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 \$ 453,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
See attached	\$ 16,633,013.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Wells Fargo Bank	San Francisco, CA	\$ 974,800.00
See Attached		

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	See attached	\$ 577,273.00
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
See attached	See attached	See attached	See attached
See Attached			

Interests in Specified Businesses**Business Entity # 1**

N/A

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.

Michael Jude Grant

Digitally signed: 06/24/2024

Filed with COE: 06/24/2024

Michael Jude Grant

Addendum to Full and Public Disclosure of Financial Interests

Form 6 - 2023

Assets Individually Valued at Over \$1,000 (March 31, 2024)

Cash - Wells Fargo Bank - checking - Port Charlotte, FL.	\$	76,589
Cash - RBC Capital - brokerage acct - Sarasota, FL.		48,133
Cash - RBC Capital - joint brokerage acct - Sarasota, FL.		1,556,297
Prudential variable annuity - surrender value - Philadelphia, PA		161,573

Debt and Equity Securities:

Ishares MSCI EAFE Small Cap	\$	4,053
AB Large Cap Growth Fd		44,721
Allspring Disciplined US		34,989
Columbia Fds Ser Tr I		38,567
Pioneer Fund Class Y		12,540
Pioneer Fundamental Growth Fd		34,077
UIT FT Sabrient Baker's Dozen		38,764
Aristotle Fds Ser Tr		17,619
Hartford Mut Fds II		32,771
Invesco Rochester Muni Opportunities Fd		23,642
Janus Invt Fd		14,480
Paypal Holdings		30,146
Pfizer, Inc.		13,875
Illumina		68,660
C3 AI Inc		2,707
US Treasury Bill		49,979
US Treasury Bill		49,279
US Treasury Bill		49,082
Flagstar Bk Natl		48,971
		608,921

Interest in Qualified Pension Trust

Voya Fixed Account	504,900
	504,900

Real Estate Interests:

786 Beach View Drive, Boca Grande, FL	1,689,900
395 Royal Tern Drive, Boca Grande, FL	3,533,600
510 W. Virginia Ave, Punta Gorda, FL	151,800
5363 Route 9N, Westport, NY	987,100
280 Bocilla Drive, Placida FL	199,500
250 Durrance Street, Punta Gorda, FL	242,700
431 West McKenzie Street, Punta Gorda, FL	332,600
144 Peckham St SW Port Charlotte, FL	461,300
305 Shreve Street, Punta Gorda, FL	191,000
610 Trabue Street Punta Gorda FL	74,000
300 S. Duval Street, Tallahassee, FL	248,600
125 Creek Drive, SE, Port Charlotte, FL	470,500
720 W Virginia Ave, Punta Gorda, FL	99,000
143 Peckham Street, Port Charlotte, FL	1,414,000
	10,095,600

Business Interests (at adjusted book value):

Pinnacle Street, LLC - Port Charlotte, FI	15,900
Granchor, LLC - Port Charlotte, FI	158,000
Venlorr, LLC - Port Charlotte, FI	103,100
Vencath, LLC - Port Charlotte, FI	77,400
Ambulance Management Services, LLC - Port Charlotte, FI	19,500
Ambitrans Medical Transport, Inc. - Port Charlotte, FI	3,207,100
	3,581,000

Total \$ 16,633,013

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Liabilities in Excess of \$1,000 (March 31, 2024)

Real Estate Loans:

Wells Fargo - 786 Beach View Drive, Boca Grande FL	\$	974,800
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Total	\$	974,800
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Primary Sources of Income Exceeding \$1,000 (for calendar 2023):

Ambulance Management Services, LLC	Port Charlotte, FL	\$	343,164
Ambitrans Medical Transport, Inc.	Port Charlotte, FL		-
Granchor, LLC	Port Charlotte, FL		24,168
Pinnacle Street, LLC	Port Charlotte, FL		1,490
Vencath, LLC	Port Charlotte, FL		11,454
Venlorr, LLC	Port Charlotte, FL		11,771
State of Florida	Tallahassee, FL		36,885
McKenzie Street rental	Punta Gorda, FL		5,957
Durrance Street rental	Punta Gorda, FL		3,644
Voya Retirement Insurance & Annuity	Hartford, CT		18,516
Social security benefits	Washington DC		51,873

Interest and dividends:

Hartford Floating Rate Fund CL I	Sarasota, FL	Dividend	1,097
Goldman Sachs Tr Investor Money Mkt Fd	Sarasota, FL	Tax exempt interest	10,337
US Treasury Bill Re-issue 7/20/23	Sarasota, FL	Tax exempt interest	5,897
US Treasury Bill Re-issue 11/28/23	Sarasota, FL	Tax exempt interest	2,564
Goldman Sachs Tr Investor Money Mkt Fd	Sarasota, FL	Dividend	41,066

Gains on sales of stock by broker:

Allspring Disciplined US Core Fund	Sarasota, FL	Div Dist	2,344
Columbia Fds Ser Tr I Dividend Income	Sarasota, FL	Div Dist	1,034
AB Large Cap Growth Fund	Sarasota, FL	Capital gain	1,873
Columbia Fds Ser Tr I Dividend Income	Sarasota, FL	Capital gain	1,054
Pioneer Fundamental Growth Fd	Sarasota, FL	Capital gain	1,087

Total	\$ 577,273
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Secondary Sources of Income:

Name of Business Entity

Ambitrans Medical Transport, Inc. (and wholly owned subsidiaries):

Grant Medical Transportation, Inc.

Port Charlotte, FL

Name, Address and Principal Business Activity of Major Sources

Medicare Part B
Washington, DC
Healthcare Financing

Lee Memorial Health Care System
Cleveland Avenue
Fort Myers, Florida

Sarasota Health Care System
1700 S. Tamiami Trail
Sarasota, Florida