

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/19/2024

General Information

Name: Ms Michelle Ann Lincoln

PID 255414

AGENCY INFORMATION

Organization	Suborganization	Title
CareerSource South Florida; Region 23	Board Members	
Monroe County	Elected Constitutional Officer	County Commissioner, District 2
South Florida Regional Planning Council	Board of Supervisors	Council Member

Net Worth

My Net Worth as of December 31, 2023 was \$ 2,849,824.30.

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 \$ 65,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
420 17th Court Gulf, Marathon, FL 33050	\$ 417,925.00
450 83rd Street, Marathon, FL 33050	\$ 322,290.00

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Description of Asset	Value of Asset
Centennial Bank (Bank Accounts)	\$ 75,722.26
First Horizon Bank (Bank Account)	\$ 33,636.00
Cincinnati Savings and Loan (Bank Account)	\$ 2,500.00
Keys Federal Credit Union (Bank Account)	\$ 10,990.00
GOLDMAN SACHS FINANCIAL SQUARE GOVERNMENT FD INSTL CL M/M	\$ 106,559.68
Raymond James Bank Deposit Program	\$ 103,478.94
ALPHABET INCORPORATED CAP STK CLASS A	\$ 26,518.50
AMAZON COM INCORPORATED	\$ 21,304.56
ANALOG DEVICES INCORPORATED	\$ 18,726.39
APPLE INCORPORATED	\$ 19,336.59
ASML HOLDING N V N Y REGISTRY SHS (NETHERLANDS)	\$ 19,530.10
BROADCOM INCORPORATED	\$ 22,555.52
CHEVRON CORPORATION NEW	\$ 13,426.16
CHUBB LIMITED (SWITZERLAND)	\$ 18,681.12
COMCAST CORPORATION NEW CLASS A	\$ 10,221.12
CUMMINS INCORPORATED	\$ 16,255.28
DUKE ENERGY CORPORATION NEW COM NEW	\$ 17,401.20
EXXON MOBIL CORPORATION	\$ 15,711.84
FORD MTR COMPANY DEL	\$ 11,710.00
GENERAL DYNAMICS CORPORATION	\$ 18,673.92
HOME DEPOT INCORPORATED	\$ 15,607.80
INVESCO BULLETSHARES 2025 CORPORATE BOND ETF	\$ 45,879.00
INVESCO BULLETSHARES 2025 HIGH YIELD CORPORATE BOND ETF	\$ 35,473.82
INVESCO BULLETSHARES 2028 CORPORATE BOND ETF	\$ 59,778.16
INVESCO BULLETSHARES 2032 CORP BD ETF	\$ 13,844.41
INVESCO TR INVT GRADE MUNS	\$ 59,838.10
ISHARES TR CORE DIV GRWTH	\$ 7,266.94
JOHNSON & JOHNSON	\$ 14,845.08

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Description of Asset	Value of Asset
JONAH WTR SPL UTIL DIST TX REV, BDS, SER 2018 BUILD AMERICA MUTUAL 3.625% DUE 07/01/2043 CALLABLE 07/01/2028 @ 100	\$ 22,319.50
JPMORGAN CHASE & COMPANY.	\$ 21,315.80
MASTERCARD INCORPORATED CLASS A	\$ 24,899.28
META PLATFORMS INCORPORATED CLASS A	\$ 19,158.08
MICROSOFT CORPORATION	\$ 21,685.93
MONTGOMERY CNTY TX MUN UTIL DIST NO 113, UNLTD TAX PARK BDS, SER 2018 ASSURED GUARANTY MUNICIPAL CORP 3.75% DUE 09/01/2043 CALLABLE 07/15/2024 @ 100	\$ 22,346.50
NEUBERGER BERMAN MUN FD INCORPORATED	\$ 50,557.50
ORACLE CORPORATION	\$ 18,095.03
PEPSICO INCORPORATED	\$ 20,148.63
PHILLIPS 66	\$ 18,462.60
PPL CORPORATION	\$ 24,963.12
PUBLIC STORAGE OPER COMPANY REIT	\$ 20,394.00
SHERWIN WILLIAMS COMPANY	\$ 16,334.45
T. ROWE PRICE BLUE CHIP GROWTH FUND INVSTR CL N/L	\$ 17,580.45
TJX COMPANIES INCORPORATED NEW	\$ 19,530.00
TRACTOR SUPPLY COMPANY	\$ 18,496.50
UNITEDHEALTH GROUP INCORPORATED	\$ 15,410.72
US TREASURY BILLS OID 04/17/2025 DUE 04/17/2025	\$ 55,612.14
VICI PPTYS INCORPORATED REIT	\$ 14,399.61
WASTE MGMT INCORPORATED DEL	\$ 19,956.72
600 17th Court LLC	\$ 445,237.00
FRS Investment, Retirement Date 2025	\$ 58,054.15
Mortgage Note 1342 74th St Ocean	\$ 244,179.29

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
Board of County Commissioners	PO Box 1980, Key West FL 33040	\$ 54,193.38
600 17th Court LLC	420 17th Court Gulf, Marathon FL 33050	\$ 30,000.00
Susan Plackard	450 83rd St. Marathon, FL 33050	\$ 20,400.00
James Ryder	450 83Rd. Marathon, FL 33050	\$ 21,600.00
Michael & Mallory Pinto	Note on 1342 74th St Ocean, Marathon, FL 33050	\$ 11,104.00

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
600 17th Court LLC	Mallory Martin	600 17th Court Gulf, Marathon, FL 33050	Dolphin Research Trainer

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.

CPA/Attorney Signature Only

If a certified public accountant licensed under Chapter 473, or attorney in good standing with the Florida Bar prepared this form for you, he or she must complete the following statement:

I, **Mark Herron** prepared the CE Form 6 in accordance with Art. II, Sec. 8, Florida Constitution, Section 112.3144, Florida Statutes, and the instructions to the form. Upon my reasonable knowledge and belief, the disclosure herein is true and correct.

Mark Herron

Digitally signed: **06/18/2024**

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.

Michelle Ann Lincoln

Digitally signed: 06/19/2024

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