

## 2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/19/2024

### General Information

Name: Hon Terry Michael Jones

PID 14312

### AGENCY INFORMATION

| Organization           | Suborganization                | Title                        |
|------------------------|--------------------------------|------------------------------|
| Judicial Circuit (1St) | Elected Constitutional Officer | Senior Retired Circuit Judge |
| Judicial Senior Judges | Consent to be Assigned         | Senior / Retired Judge       |

### Net Worth

My Net Worth as of June 19, 2024 was \$ 1,442,861.00.

**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 \$ 65,000.00.

**ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:**

| Description of Asset                                                                | Value of Asset |
|-------------------------------------------------------------------------------------|----------------|
| Marital Home - 9011 Ashville Drive, Pensacola, FL 32514                             | \$ 575,000.00  |
| Northwestern Mutual Life Ins. (Cash Value)                                          | \$ 56,323.00   |
| Florida Retirement System Investment Plan (Bond: FRS Diversified Income Fund (310)) | \$ 457,546.00  |
| Nationwide Retirement Solutions (NRS Florida Fixed Fund)                            | \$ 449,337.00  |
| Regions Bank (Personal Savings: \$5782; Checking: \$3,994)                          | \$ 9,776.00    |

**Liabilities**

LIABILITIES IN EXCESS OF \$1,000:

| Name of Creditor                        | Address of Creditor                                 | Amount of Liability |
|-----------------------------------------|-----------------------------------------------------|---------------------|
| Wells Fargo Home Mortgage Corp.         | P.O. Box 105647, Atlanta, GA 30348-5647             | \$ 41,654.00        |
| Regions Bank (HELOC)                    | P.O. Box 1984, Birmingham, AL 35201                 | \$ 107,561.00       |
| Regions Consumer Bankcard (VISA)        | P.O. Box 11007                                      | \$ 35,287.00        |
| Eglin Federal Credit Union (Mastercard) | 838 Eglin Pkwy. NE, Ft. Walton Beach, FL 32547-2781 | \$ 10,175.00        |

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

| Name of Creditor | Address of Creditor | Amount of Liability |
|------------------|---------------------|---------------------|
| N/A              |                     |                     |

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### 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        |
|----------------------------------------------------------------------|----------------------------------------------------------------------------------------|---------------|
| FRS Division of Retirement (Pension)                                 | P.O. Box 9000, Tallahassee, FL 32315-9000                                              | \$ 175,702.00 |
| State of Florida Chief Financial Officer (Senior Judge Compensation) | 200 E. Gaines Street, Tallahassee, FL 32399-0356                                       | \$ 31,500.00  |
| Social Security Administration (SS Retirement)                       | Southeastern Program Service System, 1200 Rev Abraham Woods, Jr. Blvd., Birmingham, AL | \$ 39,454.00  |
| BNY Mellon Disbursement Agent, FRS Plan Administrator (RMD)          | P.O. Box 785027, Orlando, FL 32878-5027                                                | \$ 15,500.00  |
| Nationwide Retirement Solutions, Inc., Public Sector West (RMD)      | P.O. Box 182797, Columbus, OH 43218                                                    | \$ 16,848.00  |

#### 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.

***Terry Michael Jones***

Digitally signed: 06/19/2024

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