

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 07/01/2024

General Information

Name: Mr Robert A Goodwin III

PID 238784

AGENCY INFORMATION

Organization	Suborganization	Title
Okaloosa County	Elected Constitutional Officer	Commissioner-District 4

Net Worth

My Net Worth as of December 31, 2023 was \$ 1,514,466.46.

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 \$ 100,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

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Description of Asset	Value of Asset
Cadence Bank	\$ 42,672.09
Bank of America	\$ 3,143.58
214 Chateaugay Street, Real Property Partial Interest	\$ 2,863.90
402 Valeria Street, Real Property	\$ 681,779.00
8450 Davis Road, Real Property	\$ 176,622.00
Interest in Goodwin Farms, LLC	\$ 35,000.00
Interest in Goodwin Law Group	\$ 400,000.00
Trust Interest	\$ 67,198.07
American Gr Fd of America C (GFACX)	\$ 9,317.24
First Eagle Global A (SGNEX)	\$ 18,088.28
Simple IRA: Cash	\$ 3,066.55
ISHARES 20+ YR TREASU BOND ETF (TLT)	\$ 12,458.88
PIMCO ENHANCED SHRT MTRT EXC (MINT)	\$ 13,571.44
VANGUARD MID CAP VALUE ETF (VOE)	\$ 2,473.00
VANGUARD MIDCAP GROWTH ETF (VOT)	\$ 2,588.07
VANGUARD SM CAP GROWTH ETF (VBK)	\$ 2,609.67
VANGUARD SM CAP VALUE ETF (VBR)	\$ 2,549.81
AMERICAN EUROPACIFIC GRW F2 (AEPFX)	\$ 9,376.95
AMERICAN GW FD OF AMERICA F2 (GFFFX)	\$ 18,820.63
AMERICAN WA MUTUAL F2 (WMFFX)	\$ 9,272.18
PIMCO LOW DURATION INC 12	\$ 29,761.00
CLEARBRIDGE INTL GROWTH I (LMGNX)	\$ 9,667.82
FEDERATED HRMS TTL RET BD IS (FTRBX)	\$ 106,357.12
GOLDMAN SACHS EMER MKT EQ INST (GEMIX)	\$ 4,537.29
FRS	\$ 55,921.32
ISHARES CORE S&P 500ETF	\$ 7,307.26
CADANCE BANK CD	\$ 100,000.00

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Wells Fargo	420 Montgomery Street San Francisco, CA 94104	\$ 221,610.37
Eglin Federal Credit Union	838 Eglin Pkwy NE, Fort Walton Beach, FL 32547	\$ 29,864.76
Pen Air Credit Union	1495 E. Nine Mile Road Pensacola, FL 32514	\$ 161,081.56

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
Okaloosa County Board of County Commissioners	1250 N Eglin Pkwy Ste 100, Shalimar, FL 32579	\$ 75,252.00
Goodwin Law Group	5 Clifford Drive, Shalimar, FL 32579	\$ 264,581.00

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

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.

Robert A 'Trey' Goodwin III

Digitally signed: 07/01/2024

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