

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 06/28/2024

General Information

Name: Hon Catalina Avalos

CONFIDENTIAL

PID 295595

AGENCY INFORMATION

Organization	Suborganization	Title
Judicial Circuit (17Th)	Elected Constitutional Officer	Circuit Judge

Net Worth

My Net Worth as of March 31, 2024 was \$ 2,872,569.03.

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 \$ 68,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Real Property-{REDACTED}	\$ 810,000.00
Real Property-{REDACTED}	\$ 310,000.00
Truist Bank- Savings and Checking Accounts	\$ 240,590.66
Chase Bank- Savings and Checking Account	\$ 227,865.31
National Life Group Life Insurance	\$ 14,874.43
401K- Voya Financial- MyCompass Ind. Moderate 2035 FdR6	\$ 669,058.85
Real Property-{REDACTED}	\$ 800,000.00
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Truist Bank - mortgages and line of credit	Truist Bank P.O. Box 79041 Baltimore, MD 21279-0041	\$ 267,820.22

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
Florida State Courts	500 S. Duval Street, Tallahassee, FL 32399	\$ 170,299.85
Robert Chambers-rental property	Broadview Heights, OH	\$ 9,900.00

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.

Catalina Avalos

Digitally signed: 06/28/2024

Filed with COE: 06/28/2024



Voya Financial
PO Box 990070
Hartford, CT 06199-0070

January 01, 2024 - March 31, 2024

CATALINA M AVALOS

About You

	Hire Date
CATALINA M AVALOS	01/14/2009

About Your Plan

Plan Number	Plan Type
	401K

Activity Statement for Your 401(K) Plan

Your Current Investment Portfolio for Plan

Investment Objective	Balance on 01/01/2024	Total Activity	Investment Earnings	Balance on 03/31/2024	Number of Units/Shares	Unit/Share Price
Asset Allocation						
MyCompass Ind Moderate 2035 Fd R6	\$0.00	\$664,389.92	\$4,668.93	\$669,058.85	46,689.3830	\$14.3300
Total	\$0.00	\$664,389.92	\$4,668.93	\$669,058.85		

Unit/Share prices are displayed to four decimal places.

Allocation of Future Contributions for Plan

MyCompass Ind Moderate 2035 Fd R6	100%
Total	100%

Activity by Source of Contributions for Plan 553279

Investment Objective	Balance on 01/01/2024	Contributions	Withdrawals	Investment Earnings	Balance on 03/31/2024	% Vested
Employer Match (	\$0.00	\$51,792.04	\$0.00	\$363.96	\$52,156.00	100.0%
Employee PreTax	\$0.00	\$290,811.97	\$0.00	\$2,043.65	\$292,855.62	100.0%
Year End Match	\$0.00	\$6,691.47	\$0.00	\$47.02	\$6,738.49	100.0%
Employer Profit Sharing	\$0.00	\$192,927.75	\$0.00	\$1,355.78	\$194,283.53	100.0%
Safe Harbor Match	\$0.00	\$122,166.69	\$0.00	\$858.52	\$123,025.21	100.0%
Total	\$0.00	\$664,389.92	\$0.00	\$4,668.93	\$669,058.85	

In the event you do not meet the IRC 402(g), 457(b) or other applicable deferral contribution limit, any amounts remitted to Voya as catch-up will be considered regular deferrals.

Messages for Plan.

YOUR PERSONAL PERFORMANCE The returns shown are estimated dollar-weighted rates of return in your account, assuming evenly distributed cashflow throughout the period. The actual timing of cash flows into and out of your account may cause your actual returns to differ from these estimates. Past performance is no guarantee of future results.

In addition to any expense described above, some of the plan's administrative expenses for the preceding quarter were paid from the total annual operating expense of one or more of the plan's designated investment alternatives (e.g. through revenue sharing arrangements, 12b-1 fees, sub-transfer agent fees).

TAKE ADVANTAGE OF CURRENT CONTRIBUTION LIMITS For 2024, you may be able to contribute a maximum of \$23,000 to your 403(b) or 401(k) retirement plan (possibly up to \$26,000 for certain 403(b) participants) - and, unless your 457 plan is sponsored by a nonprofit organization, if you turn 50 during 2024, you can also take advantage of the 50 plus Catch-up Provision, which permits you to contribute an additional \$7,500 during the coming year if permitted under the terms of your plan. Employees in 457 plans can save up to \$46,000 (2 x the \$23,000 maximum) through the Normal Retirement Age (NRA) Catch-up Provisions. You may not use both the NRA and the 50 plus catch-ups in the 457 plan in the same year.

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Voya Financial
PO Box 990070
Hartford, CT 06199-0070

January 01, 2024 - March 31, 2024

CATALINA M AVALOS

Investment Performance for Plan

Average Annual Total Returns as of: 03/31/2024

Variable annuities and mutual funds offered through a retirement plan are intended as long-term investments designed for retirement purposes. Money distributed from a 403(b) plan, 401(a)(3) plan, or a 457 plan will be treated as ordinary income in the year the money is distributed. Early withdrawals from a 403(b) plan and a 401(a)(3) plan, if taken prior to age 59 1/2, will be subject to the IRS 10% premature distribution penalty tax, unless an exception applies. This IRS premature distribution penalty tax does not apply to 457 plans. Account values fluctuate with market conditions, and when surrendered the principal may be worth more or less than the original amount invested.

THE PERFORMANCE DATA QUOTED REPRESENTS PAST PERFORMANCE. PAST PERFORMANCE DOES NOT GUARANTEE FUTURE RESULTS. FOR MONTH-END PERFORMANCE WHICH MAY BE LOWER OR HIGHER THAN THE PERFORMANCE DATA SHOWN PLEASE CALL 800-584-6001. INVESTMENT RETURN AND PRINCIPAL VALUE OF AN INVESTMENT WILL FLUCTUATE SO THAT, WHEN SOLD, AN INVESTMENT MAY BE WORTH MORE OR LESS THAN THE ORIGINAL COST.

The returns assume reinvestment of all dividends (ordinary income and capital gains) and are net of management fees and other fund operating expenses.

YOU SHOULD CONSIDER THE INVESTMENT OBJECTIVES, RISKS AND CHARGES, AND EXPENSES OF THE FUNDS CAREFULLY BEFORE INVESTING. THE PROSPECTUS CONTAINS THIS AND OTHER INFORMATION. ANYONE WHO WISHES TO OBTAIN A FREE COPY OF THE FUND PROSPECTUSES MAY CALL THEIR VOYA REPRESENTATIVE OR THE NUMBER ABOVE. PLEASE READ THE PROSPECTUS CAREFULLY BEFORE INVESTING.

Returns less than one year are not annualized. Fund Inception Date is the date of inception for the underlying fund, and is the date used in calculating the periodic returns. This date may also precede the portfolio's inclusion in the product.

Fund Number Investment Options	Gross / Net Fund Expense Ratio	3-Mo	1-Yr	5-Yr	10-Yr/ Inception	Fund Inception Date
Stability of Principal						
<i>Stable Value</i>						
G608-APEX Guaranteed Fixed Int Fund W V3	0.10%/0.10%				0.17%	03/08/2024
Bonds						
<i>Intermediate Core-Plus Bond</i>						
3871-Loomis Sayles Core Plus Bond Fund N	0.38%/0.38%	-0.31%	1.96%	1.26%	2.06%	12/30/1994
<i>Multisector Bond</i>						
3524-PIMCO Income Fund Inst	0.62%/0.62%	1.38%	8.08%	3.07%	4.28%	03/30/2007
Asset Allocation						
<i>Lifecycle - Index</i>						
G315-MyCompass Ind Aggressive 2025 Fd R6	0.11%/0.11%				4.98%	01/16/2024
G316-MyCompass Ind Aggressive 2035 Fd R6	0.12%/0.12%				7.43%	01/16/2024
G317-MyCompass Ind Aggressive 2045 Fd R6	0.12%/0.12%				8.64%	01/16/2024
G318-MyCompass Ind Aggressive 2055 Fd R6	0.12%/0.12%				7.99%	01/12/2024
G319-MyCompass Ind Aggressive 2065 Fd R6	0.12%/0.12%				8.90%	01/16/2024
G320-MyCompass Ind Aggressive Ret Fd R6	0.11%/0.11%				4.60%	01/16/2024
G321-MyCompass Ind Conserv 2025 Fd R6	0.11%/0.11%				2.91%	01/16/2024
G322-MyCompass Ind Conserv 2035 Fd R6	0.11%/0.11%				4.34%	01/16/2024
G323-MyCompass Ind Conserv 2045 Fd R6	0.12%/0.12%				6.20%	01/16/2024
G324-MyCompass Ind Conserv 2055 Fd R6	0.12%/0.12%				8.39%	01/16/2024
G325-MyCompass Ind Conserv 2065 Fd R6	0.12%/0.12%				8.91%	01/16/2024
G326-MyCompass Ind Conservative Ret Fd R6	0.11%/0.11%				2.94%	01/16/2024
G327-MyCompass Ind Moderate 2025 Fd R6	0.11%/0.11%				3.51%	01/02/2024
G328-MyCompass Ind Moderate 2035 Fd R6	0.12%/0.12%				5.52%	01/02/2024
G329-MyCompass Ind Moderate 2045 Fd R6	0.12%/0.12%				7.36%	01/02/2024
G330-MyCompass Ind Moderate 2055 Fd R6	0.12%/0.12%				8.31%	01/02/2024
G331-MyCompass Ind Moderate 2065 Fd R6	0.12%/0.12%				8.36%	01/02/2024
G332-MyCompass Ind Moderate Ret Fd R6	0.11%/0.11%				3.29%	01/02/2024
Balanced						
<i>Moderate Allocation</i>						
7027-American Funds Am Balanced R6	0.25%/0.25%	6.24%	18.11%	8.91%	8.37%	07/26/1975
Large Cap Value/Blend						
<i>Large Blend</i>						
C975-Fidelity 500 Index Fund	0.02%/0.02%	10.55%	29.87%	15.04%	12.95%	02/17/1988

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January 01, 2024 - March 31, 2024

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Investment Performance for Plan

Average Annual Total Returns as of: 03/31/2024

See Performance Introduction Page for Additional Information

Fund Number Investment Options	Gross / Net Fund Expense Ratio *	3-Mo	1-Yr	5-Yr	10-Yr/ Inception	Fund Inception Date
Large Value						
D264-Large Cap Value Fund R1	0.29%/0.29%	12.78%	28.32%	15.01%	14.86%	12/04/2018
Large Cap Growth						
Large Growth						
E658-Large Cap Growth Fund II R1	0.39%/0.39%	16.25%	47.68%		9.16%	10/06/2020
Small/Mid/Specialty						
Mid-Cap Blend						
D122-Fidelity Mid Cap Index Fd	0.03%/0.03%	8.61%	22.35%	11.10%	9.95%	09/08/2011
Mid-Cap Growth						
G604-Fidelity Growth Strategies Fund K6	0.45%	13.54%	27.38%	13.56%	12.63%	05/25/2017
Mid-Cap Value						
6595-Victory Sycmr Established Value F R6	0.54%/0.54%	9.24%	18.46%	13.69%	11.66%	08/16/1983
Small Blend						
C993-Fidelity Sm Cp Ind Fund	0.03%/0.03%	5.19%	19.83%	8.21%	7.74%	09/08/2011
Small Growth						
E509-Small Cap Growth Fund II R1	0.64%/0.64%	10.53%	18.96%		3.22%	08/03/2020
Small Value						
F857-Small Cap Value Fund III R1	0.41%/0.41%	11.07%	32.73%		30.86%	01/04/2023
Global / International						
Foreign Large Growth						
E657-International Growth Fund II R1	0.48%/0.48%	4.91%	10.61%		5.13%	11/17/2020
Global Large-Stock Growth						
1899-American Funds New Perspective R6	0.42%/0.42%	8.49%	22.92%	12.76%	10.96%	03/13/1973

The risks of investing in small company stocks may include relatively low trading volumes, a greater degree of change in earnings and greater short-term volatility.

Foreign investing involves special risks such as currency fluctuation and public disclosure, as well as economic and political risks.

Some of the Funds invest in securities guaranteed by the U.S. Government as to the timely payment of principal and interest; however, shares of the Funds are not insured nor guaranteed.

High yielding fixed-income securities generally are subject to greater market fluctuations and risks of loss of income and principal than are investments in lower yielding fixed-income securities.

Sector funds may involve greater-than average risk and are often more volatile than funds holding a diversified portfolio of stocks in many industries. Examples include: banking, biotechnology, chemicals, energy, environmental services, natural resources, precious metals, technology, telecommunications, and utilities.

*The Gross Expense Ratios shown do not reflect temporary fee or expense waivers that may be in effect for a fund. The Net Expense Ratios reflect any applicable temporary fee or expense waivers. The performance of a fund with a temporary fee or expense waiver would have been lower if the gross fund fees/expenses listed had been reflected.