

2023 Form 6 - Full and Public Disclosure of Financial Interests

Filed with COE: 07/01/2024

General Information

Name: Hon Colleen Burton

PID 256193

AGENCY INFORMATION

Organization	Suborganization	Title
Senate	Elected Constitutional Officer	State Senator, District 12

Net Worth

My Net Worth as of December 31, 2023 was \$ 741,940.00.

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 \$ 80,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
Residence: 2318 Coventry Ave., Lakeland, FL. 33803	\$ 774,200.00
Checking: Truist Bank, 214 N. Tryon St., Charlotte NC 28202	\$ 11,795.78
Checking: Citizens Bank & Trust, Frostproof, FL 33843	\$ 4,989.17
IRA: Mutual Fund, MCGWX/MFS GROWTH ALLOC CL C	\$ 50,969.16
Retirement Account: Florida Retirement System Pension Plan	\$ 141,816.00
See Attached	

Liabilities**LIABILITIES IN EXCESS OF \$1,000:**

Name of Creditor	Address of Creditor	Amount of Liability
Citizens Bank & Trust	P.O. Box 7, Frostproof, FL. 33843	\$ 37,027.18
CENLAR FSB	P.O. Box 77404, Ewing, NJ, 08626	\$ 284,803.42

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
State of Florida	200 E. Gaines St., Tallahassee, FL. 32399	\$ 29,697.00

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.

Colleen Burton

Digitally signed: 07/01/2024

Filed with COE: 07/01/2024



Account Statement

Q4 2023

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PTC CUST IRA FBO
COLLEEN BURTON
[REDACTED]
LAKELAND FL 33803

Your Account Executive :
KURT ELMHORST
1401 SOUTH FLORIDA AVENUE
LAKELAND, FL 33803
(863) 688-9000

INVESTMENT OBJECTIVE



Aggressive Growth

\$44,477.60

\$48,689.14

\$50,969.16

January 1, 2023

November 30, 2023

December 31, 2023

Account Summary

Retirement Account [REDACTED]	Current Month 12/01 - 12/31	Quarter to Date 10/01 - 12/31	Year to Date 01/01 - 12/31
Starting Value	\$48,689.14	\$46,390.51	\$44,477.60
Inflows	\$0.00	\$0.00	\$0.00
Outflows	\$0.00	\$0.00	\$0.00
Change in Market Value	\$2,280.02	\$4,578.65	\$6,491.56
Total Ending Value	\$50,969.16	\$50,969.16	\$50,969.16

Purchasing Power

	Available Cash	Available Margin Balance
Total	\$1.92	\$0.00

Account Statement Q4 2023

October 01, 2023-December 31, 2023

Account Ending in (2161)

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Account Holdings continued

Mutual Funds, Publicly Traded Funds and Interval Funds

Visit our digital client experience to see lot level details, average cost per share, current market values and more.

Security ID / Description	Quantity	Market Value	Cost Basis	Purchase Cost	Est Annual Income ^a
	Price		Unrealized G/L	Investment G/L	Est 30-Day Yield ^a
MCGWX MFS GROWTH ALLOC CL C _R	37.561	\$850.75	\$948.95	N/A	\$9.00
	\$22.6500		(\$98.20)		1.30%
MAGWX MFS GROWTH ALLOC CL A _R	2,170.485	\$50,116.49	\$42,568.27	N/A	\$1,037.00
	\$23.0900		\$7,548.22		2.09%
Total		\$50,967.24	\$43,517.22	\$50,967.24	\$1,046.00
			\$7,450.02		

^R Dividends and/or capital gains distributed by this security will be reinvested.

Total Account Holdings

	Market Value	Cost Basis	Est Annual Income
		Unrealized G/L	
	\$50,969.16	\$43,519.14	\$1,046.00
		\$7,450.02	

^a Refer to the statement message titled ESTIMATED ANNUAL INCOME (EAI) AND ESTIMATED YIELD (EY) for information on how this figure is calculated.