



**LEE COUNTY
ELECTIONS**

*24JUN12AM0849 SOE Lee Co F1

CANDIDATE CAMPAIGN FILE COVER SHEET
☒ **ORIGINAL**
☐ **REVISED**

Candidate Name	Brian Anderson		
Voter Registration ID #	129475117		
Residence Address	10421 McArthur Palm Ln. Unit 2316		
City and Zip Code	Fort Myers, 33966		
Mailing Address	<input checked="" type="checkbox"/> Check if same as above.		<input type="checkbox"/> Check if different from residence.
Telephone Number(s)	<input checked="" type="checkbox"/> Daytime (list below)	OR	<input type="checkbox"/> Alternate (list below)
	(315) 415-8143		
Campaign Email Address	lucidhill02@gmail.com		
Campaign Website	N/A		
Office Sought	Heritage Palms COD		
Area, District, Group or Seat #	# 2		
<p>➔ Judicial, School Board, and Special District Offices such as Community Development, Fire, Lee Health System, Library and Mosquito Control are non-partisan offices. A candidate for these offices, must indicate "non-partisan" on the line below.</p> <p>➔ A candidate for a Constitutional Office or County Commission may file partisan or "No Party Affiliation" (NPA) and shall indicate a political party affiliation or "No Party Affiliation" on the line below.</p>			
➔ Political Party for Office Sought	Non - Partisan		
Incumbent	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
Date of Birth	Sept 16, 1956		
Candidate Signature & Date	 5/31/24		

The Lee County Supervisor of Elections posts all candidate-qualifying documents and campaign finance reports on its website www.lee.vote or visit the following link: <https://www.lee.vote/Candidates/Archived-Candidate-Lists>. Under Florida Law, a candidate's campaign-contact information, such as address, telephone number, and email address are available to the public. If you have questions or need more information about becoming a candidate for public office, please call (239) LEE-VOTE (239-533-8683) and ask for the Qualifying Department.

CANDIDATE OATH**NONPARTISAN OFFICE**

(Do not use this form if a Judicial or School Board Candidate)
Check box **only** if you are seeking to qualify as a write-in candidate:

☐ Write-in candidate

*24JUN12AM0850 SOE Lee Co F1

OFFICE USE ONLY

Candidate Oath

Name to appear on ballot: Brian Anderson

Check box if two last names without hyphen. ☐ (Name cannot be changed after qualifying.)

Check box if name includes nickname. ☐ (For use of a nickname, you must complete the Nickname Affidavit on reverse side.)

I swear or affirm that I am a candidate for the nonpartisan office of Heritage Palms CDD,
(Office) (District #)
2; I am a qualified elector of Lee County, Florida;
(Circuit #) (Group or Seat #)

I am a qualified elector under the Constitution and the Laws of Florida to hold the office to which I desire to be nominated or elected; I have qualified for no other public office in the state, the term of which office or any part thereof runs concurrent with the office I seek; and I have resigned from any office from which I am required to resign pursuant to Section 99.012, Florida Statutes; and I will support the Constitution of the United States and the Constitution of the State of Florida.

Statement of Outstanding Fines, Fees, or Penalties

I owe outstanding fines, fees, or penalties, that cumulatively exceed \$250, for ethics or campaign finance violations (s. 99.021(1)(d), F.S.).

YES, I Do ☐ NO, I Do Not ☒

If you do, you must also specify the amount owed and each entity that levied the same on the reverse side.

X [Signature] (35) 415-8143 lucidhill02@gmail.com
Signature of Candidate Telephone Number Email Address
10421 McArthur Palm Ln Fort Myers Florida 33966
Address of Legal Residence City State ZIP Code

STATE OF ~~FLORIDA~~ PA
COUNTY OF Chester

[Signature]

Signature of Notary Public

Print, Type, or Stamp Commissioned Name of Notary Public below:

Sworn to (or affirmed) and subscribed before me by means of
online notarization ☐ OR physical presence ☒

this 1 day of June, 2024.

Personally Known ☐ OR Produced Identification ☒

Type of Identification Produced: Florida Drivers License

Commonwealth of Pennsylvania - Notary Seal
Alvira Zilbershteyn, Notary Public
Chester County
My Commission Expires February 27, 2027
Commission Number 1411411

General Information

Name: Brian P Anderson

Address: 10421 MCARTHUR PALM LN APT 2316, FORT MYERS, FL 33966

PID 308886

County: Lee

AGENCY INFORMATION

Organization

Suborganization

Title

Heritage Palms CDD

Board of Supervisors

Supervisor Seat 2

Disclosure Period

THIS STATEMENT REFLECTS YOUR FINANCIAL INTERESTS FOR CALENDAR YEAR ENDING DECEMBER 31, 2023 .

Primary Sources of Income

PRIMARY SOURCE OF INCOME (Over \$2,500) (Major sources of income to the reporting person)
(If you have nothing to report, write "none" or "n/a")

Name of Source of Income	Source's Address	Description of the Source's Principal Business Activity
Social Security	SUITE 25 4220 EXECUTIVE CIRCLE FORT MYERS FL 33916	SS benefits
Brian P Anderson Trust	Exeter Trust Company 290 WOODCLIFF DRIVE FAIRPORT, NY 14450	Financial Management
Brian P Anderson(BeneIRA)	Morgan Stanley Smith Barney, LLC 1 New York Plaza 7th Floor 3,303.77 3,303.77 New York, NY 10004	Financial Management

Secondary Sources of Income

SECONDARY SOURCES OF INCOME (Major customers, clients, and other sources of income to businesses owned by the reporting person) (If you have nothing to report, write "none" or "n/a")

Name of Business Entity	Name of Major Sources of Business' Income	Address of Source	Principal Business Activity of Source
N/A			

Real Property

REAL PROPERTY (Land, buildings owned by the reporting person)
(If you have nothing to report, write "none" or "n/a")

Location/Description
N/A

Intangible Personal Property

INTANGIBLE PERSONAL PROPERTY (Stocks, bonds, certificates of deposit, etc. over \$10,000)
(If you have nothing to report, write "none" or "n/a")

Type of Intangible	Business Entity to Which the Property Relates
Stock	Apple Inc
Stock	Amazon Inc
Stock	NVIDIA
Stock	Purecycle Technologies
Stock	United Rentals Inc.
Stock	Berkshire Hathaway Class B
Stock	Alphabet Inc. Class A
Stock	Meta Platforms CL A
Stock	Taiwan Semiconductor MFG
Stock	Mastercard Inc CL A
Stock	Johnson & Johnson

2023 Form 1 - Statement of Financial Interests

Filed with COE: 05/24/2024

Type of Intangible	Business Entity to Which the Property Relates
Stock	L3Harris Tech Inc.
Stock	Microsoft Corp
Stock	Visa Inc
Stock	Coca Cola Co
Stock	Philip Morris Intl
Stock	Electronic Arts Inc
Stock	Astrazeneca PLC
Stock	Moodys Corp
Stock	Heineken N V
Stock	ServiceNow Inc
Stock	Copra Inc
Stock	Infineon Tech AG
Stock	Micron Tech AG
Stock	HDFC Bank LTD
Stock	Canadian Natl RY Co
Stock	CSX Corp
Stock	Mercadolibre Inc
Stock	United Health Group Inc
Stock	MSCI Inc
Stock	Roche HLDG LTD Sponsored ADR
Stock	Every Inc
Stock	BAE Sys PLC
Stock	Nestle S A Sponsored ADR
Stock	Fiserv Inc
Stock	Intercontinental Exchange Inc Com
Stock	Union Pac Corp
Stock	Northrop Grumman Corp
Stock	Deutsche Boerse ADR
Stock	S and P Global
Stock	Constellation Brands Inc
Stock	Medtronic PLC
Stock	Admiral Group
Stock	Intuitive Surgical Inc
Stock	Alcon Inc Ord SHS

2023 Form 1 - Statement of Financial Interests

Filed with COE: 05/24/2024

Type of Intangible	Business Entity to Which the Property Relates
Stock	Vertex Pharmaceuticals
Stock	Techtronic Ends LTD
Stock	Blackrock Inc.
Stock	Thermo Fisher Scientific inc
Stock	Humana Inc
Stock	Masco Corp
Stock	Lonza Group AG
Stock	Mondelez Intl Inc
Stock	JP Morgan Chase and Co
Stock	Exxon Mobil Co
Stock	Bank of America Corp
Stock	Chevron Texaco Corp
Stock	Cisco
Stock	Caterpillar
Stock	Novartis A G Sponsored ADR
Mutual Funds	Manning & Napier Unconstrained Bond Fund
Mutual Funds	Manning & Napier Core Bond Fund
Mutual Funds	Manning & Napier High Yield Bond Fund
Mutual Funds	Manning & Napier Overseas Fund
Mutual Funds	Manning & Napier Real Estate Fund
Mutual Funds	Manning & Napier New CR Ser CL W Fund
Mutual Funds	Manning & Napier Divers Tax W Fund
Mutual Funds	ProBlend Max Term Series S
Mutual Funds	Schwab Value Advantage Fund
Mutual Funds	Schwab US DIV Equity Fund
Mutual Funds	FMI Common Stock Investor Fund
Mutual Funds	Clearbridge Appreciation Fund
Mutual Funds	Hartford Strategic Income Fund
Cash	US Dollars
ETF	Spider Series Trust NUV HGHYLD MUN
Bonds	US Treasury Notes

Liabilities

LIABILITIES (Major debts valued over \$10,000):
(If you have nothing to report, write "none" or "n/a")

Name of Creditor	Address of Creditor
PennyMac Loan Services LLC	3043 Townsgate Rd West Lake Village, CA 91361

Interests in Specified Businesses

INTERESTS IN SPECIFIED BUSINESSES (Ownership or positions in certain types of businesses)
(If you have nothing to report, write "none" or "n/a")

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 Filer

Brian P Anderson

Digitally signed: 05/24/2024

Filed with COE: 05/24/2024



LEE COUNTY ELECTIONS

Affidavit of Intent Special District Candidates

A special district candidate is prohibited from financing ANY PORTION OF his/her campaign with personal funds except as provided in this affidavit.

State of Florida

County of Lee

I, Brian Anderson am a candidate for the independent special
(print name)

district office of:

Heritage Palms CDD - 2
(include district name AND .district, seat, area or group #)

in the **November 5, 2024 General Election**. I declare that my only campaign expense, from personal funds, shall be the \$25 candidate-qualifying fee *OR* the signature verification fee for candidates who qualify by the candidate-petition method by submitting the valid signatures of 25 registered voters residing within the District boundaries.

Provided that this is my only campaign expense, I will not be required to: appoint a campaign treasurer, designate a campaign depository or file periodic campaign treasurer's reports as required by Florida Statutes §99.061 or §106.07. I understand that I am prohibited from expending, collecting, soliciting, or accepting any money or contribution(s) in-kind, in connection with my campaign.

In the event I later decide to, collect, solicit, or accept any money or contribution(s) in-kind, or make any additional campaign expense, I understand that prior to doing so, I am required to file Form DS-DE 9 (Appointment of Campaign Treasurer/Designation of Campaign Depository Form) with the Lee County Supervisor of Elections. My campaign shall then be subject to campaign finance regulations in accordance with Florida Statutes, Chapter 106 and I will be required to file periodic campaign treasurer's reports, as required by Florida Statute §106.07, with the Florida Division of Elections.

X [Signature]
Signature of Candidate

5/31/24
Date



Tommy Doyle
Supervisor of Elections
(239) LEE-VOTE (533-8683) • www.lee.vote
08-15-2023

Canvassing Board Meeting Dates – August 20, 2024, Primary Election

Logic and Accuracy Testing of the Tabulating Equipment or Voting Machines used at Early Voting and Election Day Precincts, and the Tabulating Equipment used for Vote-by-Mail Ballots:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Wednesday, 07-24-24 at 9 AM

Review of Vote-by-Mail Ballots:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• 9 AM Each Meeting (see below)
• Friday, 07-26-24 • Monday, 07-29-24 • Wednesday, 07-31-24
• Friday, 08-02-24 • Monday, 08-05-24 • Wednesday, 08-07-24
• Friday, 08-09-24 • Monday, 08-12-24 • Wednesday, 08-14-24
• Friday, 08-16-24 • Monday, 08-19-24

Election Day

Review of Vote-by-Mail Ballots and Receive Preliminary Election Night Results:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Tuesday, 08-20-24
◦ 9 AM, NOON, 3 PM, and 5 PM until finished

Canvass of Provisional Ballots, Review of Vote-by-Mail Ballots, Submit 1st Unofficial Results, Submit Official Results, Certify the Election:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Friday, 08-23-24 at 8 AM

Post-Election Automated Independent Audit:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Monday, 08-26-24 at 9 AM

In the event of a machine or manual recount, the additional dates of 08-24-24 through 08-28-24 will apply.

Canvassing Board Meeting Dates – November 5, 2024, General Election

Logic and Accuracy Testing of the Tabulating Equipment or Voting Machines used at Early Voting and Election Day Precincts, the Tabulating Equipment used for Vote-by-Mail Ballots, and the Initial Canvass of Vote-by-Mail Ballots:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Wednesday, 10-09-24 at 9 AM

Review of Vote-by-Mail Ballots:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• 9 AM Each Meeting (see below)
• Friday, 10-11-24 • Monday, 10-14-24 • Wednesday, 10-16-24
• Friday, 10-18-24 • Monday, 10-21-24 • Wednesday, 10-23-24
• Friday, 10-25-24 • Monday, 10-28-24 • Wednesday, 10-30-24
• Friday, 11-01-24 • Monday, 11-04-24

Election Day

Review of Vote-by-Mail Ballots and Receive Preliminary Election Night Results:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Tuesday, 11-05-24
◦ 9 AM, NOON, 3 PM, and 5 PM until finished

Canvass of Provisional Ballots, Review of Vote-by-Mail Ballots, Submit 1st Unofficial Results:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Friday, 11-08-24 at 2 PM

Canvass of Overseas Vote-by-Mail Ballots, Submit Official Results, Certify the Election:

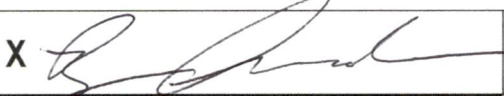
Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Friday, 11-15-24 at NOON

Post-Election Automated Independent Audit:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Monday, 11-18-24 at 9 AM

In the event of a machine or manual recount, the additional dates of 11-10-24 through 11-18-24 will apply.

I am a candidate for local office and have received a copy of the above schedules.

X 	Brian Anderson	5/29/24
Signature	Print Name	Date