

2023 Form 6 - Full and Public Disclosure of Financial Interests

General Information

Name: Kathleen Blaxberg
Address: 1655 ST PAULS DR, CLEARWATER, FL 33764
County: Pinellas

Organization	Suborganization	Title
N/A		

CANDIDATE FOR

Position	Agency Name	Position sought or held
District School Board	Pinellas County School Board	Board Member District 5

Net Worth

My Net Worth as of December 31, 2023 was \$ 1,500,000.00.

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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 \$ 50,000.00.

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

Description of Asset	Value of Asset
1655 St Pauls Dr, Clearwater, FL 33764	\$ 862,818.00
Bank Accounts Wells Fargo	\$ 67,796.85
Campaign Loan	\$ 10,000.00
FRS 2045 Retirement Date Fund (2045)	\$ 6,344.99
See Attached	

Liabilities

LIABILITIES IN EXCESS OF \$1,000:

Name of Creditor	Address of Creditor	Amount of Liability
Chase Bank	3415 VISION DRIVE OH4-7214 COLUMBUS, OH 43219-6009	\$ 284,615.67
Chase Bank	PO BOX 78232 PHOENIXAZ 85062-8232	\$ 62,913.76

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
N/A		

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

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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.

Katie Blaxberg

Digitally signed: 06/11/2024

For Qualifying
Purposes Only

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Kathleen Blaxberg – Consolidated Detailed View of Assets held at Raymond James as of 12/29/2023

	Quantity	Price	Value	Gain or (Loss) ^o	Estimated Annual Income
Cash & Cash Alternatives					
Raymond James Bank Deposit Program = 0.25% - Selected Sweep Option			\$21,072.27		\$52.68
Cash & Cash Alternatives					
Raymond James Bank Deposit Program = 0.25% - Selected Sweep Option			\$1,144.77		\$2.86
Cash & Cash Alternatives					
Raymond James Bank Deposit Program = 0.25% - Selected Sweep Option			\$2,038.49		\$5.09
Raymond James Bank			\$1,450.24		
Cash & Cash Alternatives					
Raymond James Bank Deposit Program = 0.25% - Selected Sweep Option			\$1,304.97		\$3.26
Mutual Funds					
CENTRE AMERICAN SELECT EQUITY FUND INSTL CL N/L (DHANX)	248.331	\$15.460	\$3,839.20	\$259.20 ^B	\$45.20
COLUMBIA SELIGMAN TECHNOLOGY & INFORMATION FD INSTL CL N/L (CCIZX)	7.690	\$130.550	\$1,003.93	\$263.93 ^B	
FIDELITY SELECT HEALTH CARE SERVICES PORTFOLIO N/L (FSHCX)	5.709	\$133.220	\$760.55	\$20.55 ^B	\$2.64
KINETICS THE SMALL CAP OPPORS FD INSTL CL N/L (KSCYX)	10.540	\$106.780	\$1,125.46	\$(374.54) ^B	\$16.42
SCHWARTZ VALUE FUND N/L (RCMFX)	33.232	\$43.730	\$1,453.24	\$(46.76) ^B	\$9.14
Mutual Funds Total			\$8,182.38	\$122.38	\$73.40

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Alternative Mutual Funds **

JPMORGAN HEDGED EQUITY 2 FUND CL I N/L (JHQDX)	232.801	\$15.840	\$3,687.57	\$437.57	\$35.62
CATALYST/MILLBURN HEDGE STRATEGY FUND CL I N/L (MBXIX)	93.204	\$35.090	\$3,270.53	\$20.53	\$60.02
Alternative Investments Total			\$6,958.10	\$458.10	\$95.64

Mutual Funds

BROWN ADVISORY SUSTAINABLE GROWTH FUND INSTL SHS N/L (BAFWX)	160.838	\$48.100	\$7,736.31	\$174.05 ^B	\$0.82
CALVERT US LRG CAP VALUE RESPONSIBLE INDEX FD CL I N/L (CFJIX)	249.259	\$29.670	\$7,395.51	\$648.14 ^B	\$153.29
PARNASSUS MID CAP FUND INSTL CL N/L (PFPMX)	377.023	\$37.420	\$14,108.20	\$(603.25) ^B	\$77.67
IMPAX INTERNATIONAL SUSTAINABLE ECONOMY FD INSTL C (PXNIX)	970.801	\$10.020	\$9,727.43	\$1,469.51 ^B	\$231.05
PIMCO TOTAL RETURN ESG FUND CL I2 N/L (PRAPX)	1,513.492	\$7.670	\$11,608.48	\$(1,217.48) ^B	\$399.56
TIAA-CREF CORE IMPACT BOND FUND RETAIL CL N/L (TSBRX)	1,709.351	\$9.010	\$15,401.25	\$(952.97) ^B	\$531.61
VANGUARD FTSE SOCIAL INDEX FUND ADMIRAL SHRS N/L (VFTAX)	297.176	\$45.250	\$13,447.21	\$892.31 ^B	\$147.99
Mutual Funds Total			\$79,424.39	\$410.31	\$1,541.99

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Exchange-Traded Products (ETPs)

ISHARES TR CORE US AGGBD ET (AGG)	42.000	\$99.250	\$4,168.50	\$(689.09)	\$130.54
ISHARES TR JPMORGAN USD EMG (EMB)	118.000	\$89.060	\$10,509.08	\$(2,546.18)	\$495.01
ISHARES TR NATIONAL MUN ETF (MUB)	189.000	\$108.410	\$20,489.49	\$(1,564.43)	\$542.24
ISHARES TR 0-5 YR TIPS ETF (STIP)	6.000	\$98.590	\$591.54	\$8.88	\$16.79
VANGUARD FTSE DEVELOPED MARKETS ETF (VEA)	464.000	\$47.900	\$22,225.60	\$2,677.77	\$701.10
VANGUARD SHORT-TERM INFLATION PROTECTED SECURITIES INDEX FD (VTIP)	65.000	\$47.490	\$3,086.85	\$(217.75)	\$88.21
VANGUARD TOTAL INTERNATIONAL BOND ETF (BNDX)	336.000	\$49.365	\$16,586.64	\$(2,543.84)	\$733.15
VANGUARD FTSE EMERGING MARKETS ETF (VWO)	353.000	\$41.100	\$14,508.30	\$(858.36)	\$510.79
VANGUARD MID-CAP VALUE ETF (VOE)	46.000	\$145.010	\$6,670.46	\$1,877.26	\$151.52
VANGUARD SMALL-CAP VALUE ETF (VBR)	34.000	\$179.970	\$6,118.98	\$2,115.82	\$129.47

Exchange-Traded Products (ETPs) (continued)

VANGUARD VALUE ETF (VTI)	52.000	\$149.500	\$7,774.00	\$2,201.68	\$190.89
VANGUARD TOTAL STOCK MARKET ETF (VTI)	135.000	\$237.220	\$32,024.70	\$8,880.30	\$460.76

Exchange-Traded Products Total**\$144,754.14 \$9,342.06 \$4,150.47**

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Exchange-Traded Products (ETPs)

ISHARES TR CORE US AGGBD ET (AGG)	23.000	\$99.250	\$2,282.75	\$(248.44)	\$71.48
ISHARES TR JPMORGAN USD EMG (EMB)	17.000	\$89.060	\$1,514.02	\$(317.67)	\$71.32
VANGUARD TOTAL BOND MARKET ETF (BND)	7.000	\$73.550	\$514.85	\$(53.65)	\$15.88
VANGUARD FTSE DEVELOPED MARKETS ETF (VEA)	471.000	\$47.900	\$22,560.90	\$4,501.28	\$711.68
VANGUARD SHORT-TERM INFLATION PROTECTED SECURITIES INDEX FD (VTIP)	24.000	\$47.490	\$1,139.76	\$(107.75)	\$32.57
VANGUARD TOTAL INTERNATIONAL BOND ETF (BNDX)	62.000	\$49.365	\$3,060.63	\$(373.14)	\$135.28
VANGUARD FTSE EMERGING MARKETS ETF (VWO)	293.000	\$41.100	\$12,042.30	\$715.56	\$423.97
VANGUARD MID-CAP VALUE ETF (VOE)	39.000	\$145.010	\$5,655.39	\$1,959.58	\$128.47
VANGUARD SMALL-CAP VALUE ETF (VBR)	28.000	\$179.970	\$5,039.16	\$1,876.31	\$106.62

Exchange-Traded Products (ETPs) (continued)

VANGUARD VALUE ETF (VTV)	48.000	\$149.500	\$7,176.00	\$3,005.74	\$176.21
VANGUARD TOTAL STOCK MARKET ETF (VTI)	122.000	\$237.220	\$28,940.84	\$12,903.46	\$416.39
Exchange-Traded Products Total			\$89,926.60	\$23,861.28	\$2,289.87

Please see the Exchange-Traded Products on the Understanding Your Statement page.

Portfolio Total			\$91,231.57	\$23,861.28	\$2,293.13
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Market-Linked Investments

BARCLAYS BANK PLC 4Y U.S. EQUITY AUTOCALLABLE STEP-UP BONUS NOTE NTS ISIN US06749N2D37 DUE 11/23/2026 FACTOR: 1.00000000 (06749N2D3) Debt Classification: Senior Unsecured	\$5,000.00	115.450	\$5,772.50		
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Market-Linked Investments (continued) ☞

GS FINANCE CORP. 3Y U.S. EQUITY AUTOCALLABLE ACCELERATED BUFFERED NOTE NTS ISIN US40057NSG33 DUE 11/21/2025 (40057NSG3) Debt Classification: Senior Unsecured	\$5,000.00	112.962	\$5,648.10	\$648.10
Market-Linked Investments Total			\$11,420.60	\$1,420.60

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