



Filing ID #10022193

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Charlie Joseph Crist  
**Status:** Member  
**State/District:** FL13

## FILING INFORMATION

**Filing Type:** Amendment Report  
**Filing Year:** 2016  
**Filing Date:** 05/15/2018

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charlie Crist LLC ⇒ Wells Fargo [BA]		\$50,001 - \$100,000	None		
Fidelity Brokerage Account #1 ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Fidelity Brokerage Account #1 ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Fidelity Brokerage Account #1 ⇒ Fidelity High Income (SPHIX) [MF]		\$1,001 - \$15,000	Dividends	Not Applicable	None
Fidelity Brokerage Account #1 ⇒ Fidelity Municipal Money Market (FTEXX) [MF]		\$100,001 - \$250,000	Interest	Not Applicable	\$201 - \$1,000
Fidelity Brokerage Account #1 ⇒ General Motors Company (GM) [ST]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Fidelity Brokerage Account #1 ⇒ GlaxoSmithKline PLC (GSK) [ST]		\$50,001 - \$100,000	Dividends	Not Applicable	\$201 - \$1,000
Fidelity Brokerage Account #1 ⇒		\$1,001 - \$15,000	Dividends	Not	\$1 - \$200

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
JP Morgan Chase & Co. (JPM) [ST]				Applicable	
Fidelity Brokerage Account #1 ⇒ Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Fidelity Brokerage Account #1 ⇒ Nuveen AMT-Free Municipal Credit Income Fund (NVG) [ST]		\$250,001 - \$500,000	Dividends	Not Applicable	\$5,001 - \$15,000
Fidelity Brokerage Account #1 ⇒ Southwest Airlines Company (LUV) [ST]		\$1,001 - \$15,000	Dividends	Not Applicable	\$1 - \$200
Fidelity Brokerage Account #1 ⇒ TECO Energy, Inc. (TE) [ST]		None	Capital Gains, Dividends	Not Applicable	\$100,001 - \$1,000,000
Fidelity Brokerage Account #1 ⇒ Wal-Mart Stores, Inc. (WMT) [ST]		\$1,001 - \$15,000	Dividends	Not Applicable	\$201 - \$1,000
Fidelity Rollover IRA ⇒ Fidelity Floating Rate High Income (FFRHX) [MF]		\$100,001 - \$250,000	Tax-Deferred		
Fidelity Rollover IRA ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Rollover IRA ⇒ Fidelity High Income (SPHIX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Rollover IRA ⇒ Nuveen Credit Strategies Income Fund Shares of Beneficial Interest (JQC) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity SEP IRA ⇒ BCE, Inc. (BCE) [ST]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity SEP IRA ⇒ Fidelity Floating Rate High Income (FFRHX) [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity SEP IRA ⇒ Fidelity Government Cash Reserves (FDRXX) [MF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity SEP IRA ⇒		\$50,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity High Income (SPHIX) [MF]		\$100,000			
State of Florida Pension Plan ⇒ State of Florida Pension Plan [DB]		Undetermined	Tax-Deferred		
Sunoco LP Common Units representing limited partner interests (SUN) [ST]		\$50,001 - \$100,000	Interest	Not Applicable	\$1,001 - \$2,500
Wells Fargo - Premier Checking [BA]		\$100,001 - \$250,000	Interest	Not Applicable	\$1 - \$200

\* Asset class details available at the bottom of this form. For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

### SCHEDULE C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Morgan & Morgan Tampa P.A.	Salary	N/A	\$604,596.00
State of Florida	Pension	N/A	\$49,719.00

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	JPMorgan Chase Bank	August 2015	Mortgage	\$500,001 - \$1,000,000

### SCHEDULE E: POSITIONS

None disclosed.

### SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
November 1998	State of Florida Pension Plan	Under terms of defined benefit state pension plan, filer receives monthly payments of \$4,025.

### SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- Charlie Crist LLC  
LOCATION: US
- Fidelity Brokerage Account #1  
LOCATION: US
- Fidelity Rollover IRA
- Fidelity SEP IRA
- State of Florida Pension Plan  
LOCATION: US

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**Trusts:** Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "excepted trusts" need not be disclosed. Have you excluded from this report details of such a trust benefiting you, your spouse, or dependent child?

☐ Yes ☒ No

**Exemption:** Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or dependent child because they meet all three tests for exemption?

☐ Yes ☒ No

## CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Financial Disclosure Report are true, complete, and correct to the best of my knowledge and belief.

**Digitally Signed:** Hon. Charlie Joseph Crist , 05/15/2018