

Please print or type your name, mailing address, agency name, and position below:

FOR OFFICE USE ONLY:

LAST NAME -- FIRST NAME -- MIDDLE NAME :

Whitehead Patty Backos

MAILING ADDRESS :

20791 Tanglewood Lane

CITY : ZIP : COUNTY :  
 Estero 33928 Lee

NAME OF AGENCY :  
 Village of Estero Design Review Land Use Board

NAME OF OFFICE OR POSITION HELD OR SOUGHT :  
 Village of Estero Design Review Board Member

You are not limited to the space on the lines on this form. Attach additional sheets, if necessary.  
 CHECK ONLY IF  CANDIDATE OR  NEW EMPLOYEE OR APPOINTEE

*NOL*

19-07-16 AM09:05

**\*\*\*\* BOTH PARTS OF THIS SECTION MUST BE COMPLETED \*\*\*\***

**DISCLOSURE PERIOD:**

THIS STATEMENT REFLECTS YOUR FINANCIAL INTERESTS FOR THE PRECEDING TAX YEAR, WHETHER BASED ON A CALENDAR YEAR OR ON A FISCAL YEAR. PLEASE STATE BELOW WHETHER THIS STATEMENT IS FOR THE PRECEDING TAX YEAR ENDING EITHER (must check one):

DECEMBER 31, 2015  OR  SPECIFY TAX YEAR IF OTHER THAN THE CALENDAR YEAR: \_\_\_\_\_

**MANNER OF CALCULATING REPORTABLE INTERESTS:**

FILERS HAVE THE OPTION OF USING REPORTING THRESHOLDS THAT ARE ABSOLUTE DOLLAR VALUES, WHICH REQUIRES FEWER CALCULATIONS, OR USING COMPARATIVE THRESHOLDS, WHICH ARE USUALLY BASED ON PERCENTAGE VALUES (see instructions for further details). CHECK THE ONE YOU ARE USING (must check one):

COMPARATIVE (PERCENTAGE) THRESHOLDS  DOLLAR VALUE THRESHOLDS

**PART A -- PRIMARY SOURCES OF INCOME** [Major sources of income to the reporting person - See instructions]  
 (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
Spouse's Income		

**PART B -- SECONDARY SOURCES OF INCOME**  
 [Major customers, clients, and other sources of income to businesses owned by the reporting person - See instructions]  
 (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			

**PART C -- REAL PROPERTY** [Land, buildings owned by the reporting person - See instructions]  
 (If you have nothing to report, write "none" or "n/a")

n/a

**FILING INSTRUCTIONS** for when and where to file this form are located at the bottom of page 2.  
**INSTRUCTIONS** on who must file this form and how to fill it out begin on page 3.

**PART D — INTANGIBLE PERSONAL PROPERTY** (Stocks, bonds, certificates of deposit, etc. - See instructions)  
 (If you have nothing to report, write "none" or "n/a")

TYPE OF INTANGIBLE	BUSINESS ENTITY TO WHICH THE PROPERTY RELATES
See attached list of Stocks and Bonds currently owned,	

**PART E — LIABILITIES** (Major debts - See instructions)  
 (If you have nothing to report, write "none" or "n/a")

NAME OF CREDITOR	ADDRESS OF CREDITOR
Great Lakes Borrower Services - Student Loan	Great Lakes PO Box 530229 Atlanta, GA 30353-0229

**PART F — INTERESTS IN SPECIFIED BUSINESSES** (Ownership or positions in certain types of businesses - See instructions)  
 (If you have nothing to report, write "none" or "n/a")

NAME OF BUSINESS ENTITY	BUSINESS ENTITY # 1	BUSINESS ENTITY # 2
n/a		
ADDRESS OF BUSINESS ENTITY		
PRINCIPAL BUSINESS ACTIVITY		
POSITION HELD WITH ENTITY		
I OWN MORE THAN A 5% INTEREST IN THE BUSINESS		
NATURE OF MY OWNERSHIP INTEREST		

**PART G — TRAINING**

For elected municipal officers required to complete annual ethics training pursuant to section 112.3142, F.S.

I CERTIFY THAT I HAVE COMPLETED THE REQUIRED TRAINING.

IF ANY OF PARTS A THROUGH G ARE CONTINUED ON A SEPARATE SHEET, PLEASE CHECK HERE

**SIGNATURE OF FILER:**

Signature:

Patty Whitehead

Date Signed:

7/14/16

**CPA or ATTORNEY SIGNATURE ONLY**

If a certified public accountant licensed under Chapter 473, or attorney in good standing with the Florida Bar prepared this form for you, he or she must complete the following statement:

I, \_\_\_\_\_, prepared the CE Form 1 in accordance with Section 112.3145, Florida Statutes, and the instructions to the form. Upon my reasonable knowledge and belief, the disclosure herein is true and correct.

CPA/Attorney Signature: \_\_\_\_\_

Date Signed: \_\_\_\_\_

**FILING INSTRUCTIONS:**

**WHAT TO FILE:**

After completing all parts of this form, **including signing and dating it**, send back only the first sheet (pages 1 and 2) for filing.

If you have nothing to report in a particular section, you must write "none" or "n/a" in that section(s).

**NOTE:**

**MULTIPLE FILING UNNECESSARY:**

A candidate who previously filed Form 1 because of another public position must file a copy of his or her Form 1 when qualifying. A candidate who files a Form 1 with a qualifying officer is not required to file with the Commission or Supervisor of Elections.

**Facsimiles will not be accepted.**

**WHERE TO FILE:**

If you were mailed the form by the Commission on Ethics or a County Supervisor of Elections for your annual disclosure filing, return the form to that location.

**Local officers/employees** file with the Supervisor of Elections of the county in which they permanently reside. (If you do not permanently reside in Florida, file with the Supervisor of the county where your agency has its headquarters.)

**State officers or specified state employees** file with the Commission on Ethics, P.O. Drawer 15709, Tallahassee, FL 32317-5709; physical address: 325 John Knox Road, Building E, Suite 200, Tallahassee, FL 32303.

**Candidates** file this form together with their qualifying papers.

To determine what category your position falls under, see page 3 of instructions.

**WHEN TO FILE:**

**Initially**, each local officer/employee, state officer, and specified state employee must file **within 30 days** of the date of his or her appointment or of the beginning of employment. Appointees who must be confirmed by the Senate must file prior to confirmation, even if that is less than 30 days from the date of their appointment.

**Candidates** must file at the same time they file their qualifying papers.

**Thereafter**, file by July 1 following each calendar year in which they hold their positions.

**Finally**, file a final disclosure form (Form 1F) within 60 days of leaving office or employment. Filing a CE Form 1F (Final Statement of Financial Interests) does **not** relieve the filer of filing a CE Form 1 if the filer was in his or her position on December 31, 2015.

Patty Whitehead Checking Account Current Balance:

**Balance as of 07/13/2016:** \$3,278.04

**Account Number:** [REDACTED]

**Available Balance:** \$3,272.76

**Account Profile**

Last Statement Beginning Balance	\$2,856.69
Last Statement Ending Balance	\$2,565.76
Last Statement Beginning Date	05/24/2016
Last Statement Ending Date	06/23/2016
Date Account Opened	08/07/2002

**Interest Details**

Interest Earned Since Last Statement Period	\$0.00
Interest Earned Last Statement Period	\$0.00
Interest Earned in 2016	\$0.00
Interest Earned in 2015	\$0.00

**Holdings for Trad IRA-1 (As of 07/14/2016)**

**Exchange-Traded & Closed End Funds**

Description	Symbol	Asset Category	Shares	Price/Share	Today's \$ Change	Today's % Change	Today's Value Change	Estimated Current Value
VANECK VECTORS GLOBAL ALTERNATIVE ENERGY ETF	GEX	Growth	38.656	\$51.53	+\$0.42	+0.82	+\$16.24	\$1,991.96
<b>Total:</b>							<b>\$16.24</b>	<b>\$1,991.96</b>

**Bonds & CDs -- Fixed Income**

Name	Type	Maturity Date	Maturity Value	Rate	Value
CONOCOPHILLIPS NOTE	Corporate	02/01/2039	\$6,000.00	6.500%	\$7,980.84
BEXAR COUNTY TEXAS HOSPITAL DIST CTFS OBLIG BUILD AMER BDS	Municipal-Taxable	02/15/2039	\$5,000.00	6.904%	\$5,508.05
<b>Total:</b>			<b>\$11,000.00</b>		<b>\$13,488.89</b>

**Total Holdings Value: \$28,611.89**

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**Holdings for Trad IRA-1 (As of 07/14/2016)**

Summary for Trad IRA-1

<u>Cash</u>	\$1,399.66	Value of holdings:	\$28,611.89
<u>Stocks</u>	\$11,731.38	Current account value:	\$28,611.89
<u>Exchange-Traded &amp; Closed End Funds</u>	\$1,991.96	Account value one year ago:	\$26,962.32
<u>Bonds &amp; CDs -- Fixed Income</u>	\$13,488.89		
	<b>\$28,611.89</b>		

**Cash**

Description	Current Yield / Rate	Value
CASH	---	\$1,399.66
<b>Total:</b>		<b>\$1,399.66</b>

**Stocks**

Description	Symbol	Asset Category	Research Opinion	Shares	Price/Share	Today's \$ Change	Today's % Change	Today's Value Change	Estimated Current Value
AT&T INC	T	Growth & Income	Hold	61.39282	\$42.71	+\$0.12	+0.28	+\$7.37	\$2,622.08
BCE INC	BCE	Growth & Income	Hold	59.26234	\$48.53	+\$0.25	+0.52	+\$14.82	\$2,876.00
CSX CORP	CSX	Growth & Income	Buy	215.16397	\$28.97	+\$0.76	+2.69	+\$163.52	\$6,233.30
<b>Total:</b>								<b>\$185.71</b>	<b>\$11,731.38</b>

The Edward Jones Research Opinion referenced does not take into account your particular investment profile and is not intended as an express recommendation to purchase, hold or sell particular securities, financial instruments or strategies. You should contact your Edward Jones Financial Advisor before acting upon the Edward Jones Research Opinion referenced. The estimated current value is based on the number of shares you hold. Share price is at least 15 minutes old. On a day when the market is closed, change reflects the previous market day. Today's Value Change assumes all current shares were held at market open.

My Account: Balances

01:27pm ET 07/14

Patty Whitehead

Account number: -----63

Total account value

Prev close  
\$13,437.12

Current value  
\$13,497.35

Today's net chan  
\$60.23 (0.45%)

Cash Balances

Prev close

Current value

Today's net chan

Cash & cash alternatives

Cash \$0.00 \$0.00 \$0.00

Cash alternatives \$10,167.37 \$10,167.37 \$0.00

Savings \$0.00 \$0.00 \$0.00

Total \$10,167.37 \$10,167.37 \$0.00

Cash available for withdrawal \$10,167.41

Positions

Prev close

Current value

Today's net chan

Positions

Stock value \$3,269.75 \$3,329.98 \$60.23 (1.84%)

Option value \$0.00 \$0.00 \$0.00

Mutual fund value \$0.00 \$0.00 \$0.00

Bond value \$0.00 \$0.00 \$0.00

Total \$3,269.75 \$3,329.98 \$60.23 (1.84%)

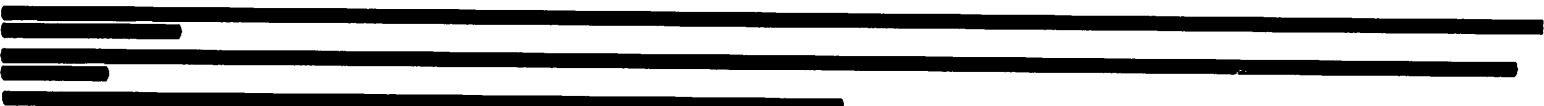
Funds Available for Trading

Current value

Funds available for trading

Available for trading \$10,167.37

Nonmarginable funds \$10,167.37



Note: For best results, print in color or with background images

enabled. **Portfolio: Positions - Patty Whitehead**

01:24pm ET 07/14/16

Stocks							View: Stock (default)	
Symbol	Qty	Last	Chg (\$)	Cost	Mkt value*	Maint req	Gain (\$)*	Gain (%)*
CAT	15	80.3456	0.6556	1,418.25	1,205.18	0.00	-213.07	-15.02%
MGA	40	37.78	0.77	1,020.00	1,511.20	0.00	491.20	48.16%
SPWR	40	15.35	0.50	695.40	614.00	0.00	-81.40	-11.71%
							Current value: <b>\$3,330.38</b>	<b>\$60.63 (1.85%)</b>

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Note: For best results, print in color or with background images enabled.

**My Account: Balances**

01:28pm ET 07/14

Patty Whitehead

Account number: -----44

**Total account value**

Prev close  
**\$31,630.33**

Current value  
**\$31,628.75**

Today's net chan  
-\$1.58 (0.00%)

**Cash Balances**

Prev close

Current value

Today's net chan

**Cash & cash alternatives**

Cash \$0.00 \$0.00 \$0.00

Cash alternatives \$169.55 \$169.55 \$0.00

Savings \$0.00 \$0.00 \$0.00

**Total \$169.55 \$169.55 \$0.00**

**Cash available for withdrawal \$169.55**

**Positions**

Prev close

Current value

Today's net chan

**Positions**

Stock value \$2,030.75 \$2,029.17 -\$1.58 (0.08%)

Option value \$0.00 \$0.00 \$0.00

Mutual fund value \$29,430.03 \$29,430.03 \$0.00

Bond value \$0.00 \$0.00 \$0.00

**Total \$31,460.78 \$31,459.20 -\$1.58 (0.01%)**

**Funds Available for Trading**

Current value

**Funds available for trading**

Available for trading \$169.55

Nonmarginable funds \$169.55

[REDACTED]

[REDACTED]



Note: For best results, print in color or with background images

enabled. **Portfolio:** Positions - Patty Whitehead

01:30pm ET 07/14/16

**Mutual Funds**

View: Mutual fund (default)

Symbol	Qty	NAV*	Chg (\$)	Offer*	Cost	Mkt value*	Maint req	Gain (\$)*	Gain (%)*
DBIRX	97.466	10.75	0.03	10.75	1,000.00	1,047.76	0.00	47.76	4.78%
DODIX	350.925	13.84	0.02	13.84	4,228.30	4,856.80	0.00	628.51	14.86%
MFOCX	907.99	15.68	-0.06	15.68	14,942.85	14,237.28	0.00	-705.56	-4.72%
SLMCX	149.746	56.64	-0.09	56.64	6,584.71	8,481.61	0.00	1,896.90	28.81%
VFINX	4.058	198.76	0.04	198.76	348.14	806.57	0.00	458.43	131.68%

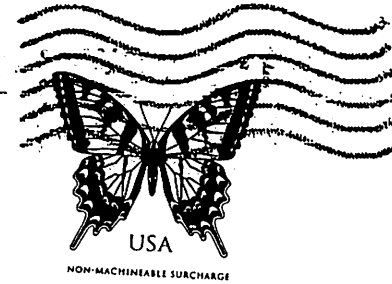
Current value: **\$29,430.03**    **\$0.00 (0.00%)**

[REDACTED]

[REDACTED]

P. Whitehead  
20791 Tanglewood Lane  
Estero, FL 33928

TAMPA FL 335  
SAINT PETERSBURG FL  
16 JUL 2016 PM 3 L



19-07 '16 AM09:05

Lee County Supervisor of Elections,  
PO Box 2545,  
Fort Myers, FL 33902

Attn: Tammy Lipa

33902-254545

