



Filing ID #10060583

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Aaron P. Bean  
**Status:** Member  
**State/District:** FL04

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2023  
**Filing Date:** 05/15/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Alliant Credit Union Savings Account [BA]	JT	\$1 - \$1,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Fidelity IRA ⇒ Caterpillar, Inc. (CAT) [ST]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA ⇒ Fidelity Money Market [BA]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Fidelity IRA ⇒ Rayonier Advanced Materials Inc. (RYAM) [ST]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
First Port City Bank Stock [PS] DESCRIPTION: First Port City Bank, Brainbridge GA	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Friendly Road Rental House [RP] LOCATION: Fernandina Beach, FL, US	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
Garage storage rental [OT] DESCRIPTION: Garage storage rental on home detached garage. COMMENTS: Asset value range is associated with the garage portion of the property which was purchased in December 2021.	JT	\$250,001 - \$500,000	Rent	\$5,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Lincoln Financial ⇒ AM FDS EUPAC Growth Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Lincoln Financial ⇒ Fidelity Midcap Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Lincoln Financial ⇒ JPM SMCP Growth Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Lincoln Financial ⇒ MTR Total Return Bond Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Lincoln Financial ⇒ Vanguard Index Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		<input type="checkbox"/>
PNC Checking Account [BA] DESCRIPTION: Interest was .36 cents	JT	\$1,001 - \$15,000	Interest	None	<input type="checkbox"/>
PNC Money Market [BA]	JT	\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
PNC Savings Account [BA] DESCRIPTION: Interest was .07 cents	JT	\$1,001 - \$15,000	Interest	None	<input type="checkbox"/>
PNC Savings Account [BA] DESCRIPTION: Interest was .10 cents	JT	\$1,001 - \$15,000	Interest	None	<input type="checkbox"/>
St. Paul Boulevard Rental House [RP] LOCATION: Yulee, FL, US	JT	\$250,001 - \$500,000	Rent	\$15,001 - \$50,000	<input type="checkbox"/>
State of Florida Retirement System [PE] DESCRIPTION: Pension to be paid upon qualified retirement age.		Undetermined	None		<input type="checkbox"/>

\* Investment vehicle 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 B: TRANSACTIONS

None disclosed.

## SCHEDULE C: EARNED INCOME

Source	Type	Amount
UF Health Jacksonville	Salary	\$35,101.40
COMMENTS: Final paycheck from 12/31/22 and cash out of unused paid time off from 11/8/2008-12/31/2022.		

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Alliant Credit Union	December 2021	Residential Mortgage	\$500,001 - \$1,000,000
JT	Synovus Bank	June 2010	Rental House Mortgage	\$50,001 - \$100,000
JT	Synovus Bank	June 2010	Rental House Mortgage	\$50,001 - \$100,000

### SCHEDULE E: POSITIONS

None disclosed.

### SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
June 2022	Aaron Bean and UF Health Jacksonville	Aaron Bean resigned his position with the organization on December 31, 2022.
COMMENTS: Final paycheck and unused paid time off was paid in January of 2023 from position resigned December 31, 2022.		
November 2000	Aaron Bean and the State of Florida	Pension to be paid upon qualified retirement age.

### SCHEDULE G: GIFTS

None disclosed.

### SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
United Way of St. John's County	01/28/2023	01/29/2023	Fernandina Beach - St. Augustine - Fernandina Beach	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Treehouse of Tallahassee	02/25/2023	02/26/2023	Fernandina Beach - Tallahassee - Fernandina Beach	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
North Cobb Christian School	04/22/2023	04/23/2023	Fernandina Beach - Atlanta - Washington DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BEAM	08/26/2023	08/27/2023	Fernandina Beach - Jacksonville Beach - Fernandina Beach	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Kare House	11/16/2023	11/18/2023	Washington DC - Asheville - Fernandina Beach	1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Fidelity IRA
- Lincoln Financial

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

IPO: Did you purchase any shares that were allocated as a part of an Initial Public Offering?

☐ Yes ☒ No

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. Aaron P. Bean , 05/15/2024