



Filing ID #10066628

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. Scott Scott Franklin  
**Status:** Member  
**State/District:** FL18

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2024  
**Filing Date:** 07/31/2025

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of Central Florida Personal Checking Accounts [BA]	JT	\$100,001 - \$250,000	Interest	\$1 - \$200	<input type="checkbox"/>
OK3 Capital Holdings, LLC Checking Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
OK3 Properties, LLC [RP]  LOCATION: Polk, FL, US DESCRIPTION: Lakeland, Florida commercial rental property #2		\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
OK3 Properties, LLC [RP]  LOCATION: Polk, FL, US DESCRIPTION: Lakeland, Florida commercial rental property #1		\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
OK3 Properties, LLC Checking Account [BA]		\$250,001 - \$500,000	Interest	\$1 - \$200	<input type="checkbox"/>
Pacific Life VUL policy [WU]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
PruLife Custom Premier Life Insurance Policy [WU]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
The Baldwin Insurance Group, Inc. - Class A Common Stock (BRP) [ST]		\$5,000,001 - \$25,000,000	None		<input type="checkbox"/>
BRP Colleague, Inc. 401(k) ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Employer 401(k) Plan. 100% invested in VFIAX (Large Blend)					
Fidelity Joint TBE ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Apple Inc. - Common Stock (AAPL) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]	JT	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Cisco Systems, Inc. - Common Stock (CSCO) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Fidelity Cash Reserves (FDRXX) [MF]	JT	\$500,001 - \$1,000,000	Interest	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Home Depot, Inc. (HD) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Johnson & Johnson Common Stock (JNJ) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Kenvue Inc. Common Stock (KVUE) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Joint TBE ⇒ McDonald's Corporation Common Stock (MCD) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Joint TBE ⇒ PepsiCo, Inc. - Common Stock (PEP) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Procter & Gamble Company (PG) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]	JT	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Visa Inc. (V) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Walmart Inc. Common Stock (WMT) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Air Products and Chemicals, Inc. Common Stock (APD) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Air Products and Chemicals, Inc. Common Stock (APD) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Amgen Inc. - Common Stock (AMGN) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Roth IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Automatic Data Processing, Inc. - Common Stock (ADP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Automatic Data Processing, Inc. - Common Stock (ADP) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]	SP	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]		\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Chubb Limited Common Stock (CB) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Chubb Limited Common Stock (CB) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Comcast Corporation - Class A Common Stock (CMCSA) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Comcast Corporation - Class A Common Stock (CMCSA) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Advisor Total Bond Fund: Class Z (FBKWX) [MF]	SP	\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Advisor Total Bond Fund: Class Z (FBKWX) [MF]					
Fidelity Roth IRA ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Cash Reserves (FDRXX) [MF]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Mid-Cap Stock Fund (FMCSX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Mid-Cap Stock Fund (FMCSX) [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ First Trust SMID Cap Rising Dividend Achievers ETF (SDVY) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ First Trust SMID Cap Rising Dividend Achievers ETF (SDVY) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ General Dynamics Corporation Common Stock (GD) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ General Dynamics Corporation Common Stock (GD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Home Depot, Inc. (HD) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Home Depot, Inc. (HD) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Illinois Tool Works Inc. Common Stock (ITW) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Illinois Tool Works Inc. Common Stock (ITW) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Roth IRA ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Johnson & Johnson Common Stock (JNJ) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Johnson & Johnson Common Stock (JNJ) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Lord Abbett Short Duration High Yield Fund Class I (LSYIX) [MF]		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Lord Abbett Short Duration High Yield Fund Class I (LSYIX) [MF]	SP	\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ McDonald's Corporation Common Stock (MCD) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ McDonald's Corporation Common Stock (MCD) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Merck & Company, Inc. Common Stock (MRK) [ST]					
Fidelity Roth IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Pepsico, Inc. (PEP) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ PepsiCo, Inc. - Common Stock (PEP) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Procter & Gamble Company (PG) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ The Hershey Company Common Stock (HSY) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ The Hershey Company Common Stock (HSY) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Visa Inc. (V) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Visa Inc. (V) [ST]					
Fidelity Roth IRA ⇒ Walmart Inc. Common Stock (WMT) [ST]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Walmart Inc. Common Stock (WMT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Air Products and Chemicals, Inc. Common Stock (APD) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Automatic Data Processing, Inc. - Common Stock (ADP) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]		\$50,001 - \$100,000	None		<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Chubb Limited Common Stock (CB) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Comcast Corporation - Class A Common Stock (CMCSA) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Fidelity Advisor Total Bond Fund: Class Z (FBKWX)		\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	<input checked="" type="checkbox"/>



Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
[MF]					
Fidelity Traditional IRA ⇒ Fidelity Cash Reserves (FDRXX) [MF]		\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Fidelity Mid-Cap Stock Fund (FMCSX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ First Trust SMID Cap Rising Dividend Achievers ETF (SDVY) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ General Dynamics Corporation Common Stock (GD) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Home Depot, Inc. (HD) [ST]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Illinois Tool Works Inc. Common Stock (ITW) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Johnson & Johnson Common Stock (JNJ) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Lord Abbett Short Duration High Yield Fund Class I (LSYIX) [MF]		\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ McDonald's Corporation Common Stock (MCD) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Traditional IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ PepsiCo, Inc. - Common Stock (PEP) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Procter & Gamble Company (PG) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ The Hershey Company Common Stock (HSY) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Visa Inc. (V) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Walmart Inc. Common Stock (WMT) [ST]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input checked="" 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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Joint TBE ⇒ BRP Group, Inc. - Class A Common Stock (BRP) [ST]  DESCRIPTION: 54,445 shares of BRP sold on 3/21/24 at average price of \$30.04 for \$1,635,630.16.	JT	03/21/2024	S (partial)	\$1,000,001 - \$5,000,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ BRP Group, Inc. - Class A Common Stock (BRP) [ST]  DESCRIPTION: 50 shares of BRP sold at \$29.00 for \$1,449.98	JT	04/09/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ The Baldwin Insurance Group, Inc. - Class A Common Stock (BRP) [ST]	JT	05/08/2024	S (partial)	\$500,001 - \$1,000,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Joint TBE ⇒ Starbucks Corporation - Common Stock (SBUX) [ST]	JT	08/14/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Walmart Inc. Common Stock (WMT) [ST]		08/01/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Pfizer, Inc. Common Stock (PFE) [ST]		08/01/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ NextEra Energy, Inc. Common Stock (NEE) [ST]		08/01/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Lord Abbott Ultra Short Bond CL I [CS] DESCRIPTION: 1,272.642 SHARES OF LUBYX @ \$10.01		08/01/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST]		08/01/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Kenvue Inc. Common Stock (KVUE) [ST]		08/01/2024	S	\$447.03	<input type="checkbox"/>
Fidelity Roth IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		08/01/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ iShares Core S&P Small Cap E [OT] LOCATION: US DESCRIPTION: 100 SHARES OF IJR @ \$114.35		08/01/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ INVESCO QQQ TR UNIT SER 1 [OT] LOCATION: US DESCRIPTION: 40 SHARES OF QQQ @ \$457.41		08/01/2024	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ FIDELITY MID CAP STOCK [OT] LOCATION: US DESCRIPTION: 50.872 SHARES OF FMCSX @ \$41.28		08/01/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Discover Financial Services Common Stock (DFS) [ST]		08/01/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒		08/01/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Costco Wholesale Corporation - Common Stock (COST) [ST]			(partial)		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Cisco Systems, Inc. - Common Stock (CSCO) [ST]		08/01/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ BERKSHIRE HATHAWAY INC COM USD0.0033 CLASS B (BRKB) [OT]  LOCATION: US DESCRIPTION: 10 SHARES OF BRKB @ \$431.84		08/01/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]		08/01/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		08/01/2024	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]		08/02/2024	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Starbucks Corporation - Common Stock (SBUX) [ST]		08/02/2024	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Procter & Gamble Company (PG) [ST]		08/02/2024	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Pepsico, Inc. (PEP) [ST]		08/02/2024	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		08/02/2024	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ McDonald's Corporation Common Stock (MCD) [ST]		08/02/2024	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ LORD ABBETT SHORT DURATION HIGH YLD I (LSYIX) [OT]  LOCATION: US DESCRIPTION: 798.576 SHARES OF LSYIX @ \$9.83		08/02/2024	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Johnson & Johnson Common Stock (JNJ) [ST]		08/02/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Roth IRA ⇒ INVESCO EXCHANGE TRADED FD TR II NASDAQ 100 ETF (QQQM) [OT]  LOCATION: US DESCRIPTION: 40 SHARES OF QQQM @ \$184.65		08/02/2024	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ The Hershey Company Common Stock (HSY) [ST]		08/02/2024	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ General Dynamics Corporation Common Stock (GD) [ST]		08/02/2024	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ FIRST TR EXCHANGE-TRADED FD VI SMID RISING ETF [OT]  LOCATION: US DESCRIPTION: 230 SHARES OF SDVY @ \$34.17		08/02/2024	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ FIDELITY ADVISOR TOTAL BOND CL Z (FBKWX) [OT]  LOCATION: US DESCRIPTION: 2,729.145 SHARES OF FBKWZ @ \$9.71		08/02/2024	P	\$15,001 - \$50,000	
Fidelity Roth IRA ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		08/02/2024	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Air Products and Chemicals, Inc. Common Stock (APD) [ST]		08/02/2024	P	\$1,001 - \$15,000	
Fidelity Traditional IRA ⇒ Starbucks Corporation - Common Stock (SBUX) [ST]		08/14/2024	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]		08/07/2024	P	\$50,001 - \$100,000	
Fidelity Traditional IRA ⇒ Chubb Limited Common Stock (CB) [ST]		08/07/2024	P	\$50,001 - \$100,000	
Fidelity Traditional IRA ⇒ Air Products and Chemicals, Inc. Common Stock (APD) [ST]		08/07/2024	P	\$50,001 - \$100,000	
Fidelity Traditional IRA ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		08/07/2024	P	\$50,001 - \$100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Traditional IRA ⇒ FIDELITY ADVISOR TOTAL BOND CL Z (FBKWX) [OT]  LOCATION: US DESCRIPTION: 23,545.786 SHARES OF FBKWX @ \$9.61		08/07/2024	P	\$100,001 - \$250,000	
Fidelity Traditional IRA ⇒ FIRST TR EXCHANGE-TRADED FD VI SMID RISING ETF [OT]  LOCATION: US DESCRIPTION: 1955 SHARES OF SDVY @ \$33.27		08/07/2024	P	\$50,001 - \$100,000	
Fidelity Traditional IRA ⇒ General Dynamics Corporation Common Stock (GD) [ST]		08/07/2024	P	\$50,001 - \$100,000	
Fidelity Traditional IRA ⇒ The Hershey Company Common Stock (HSY) [ST]		08/07/2024	P	\$50,001 - \$100,000	
Fidelity Traditional IRA ⇒ INVESCO EXCHANGE TRADED FD TR II NASDAQ 100 ETF (QQQM) [OT]  LOCATION: US DESCRIPTION: 360 SHARES OF QQQM @ \$180.18		08/07/2024	P	\$50,001 - \$100,000	
Fidelity Traditional IRA ⇒ Johnson & Johnson Common Stock (JNJ) [ST]		08/07/2024	P	\$15,001 - \$50,000	
Fidelity Traditional IRA ⇒ LORD ABBETT SHORT DURATION HIGH YLD I (LSYIX) [OT]  LOCATION: US DESCRIPTION: 6383.792 SHARES OF LSYIX @ \$9.81		08/07/2024	P	\$50,001 - \$100,000	
Fidelity Traditional IRA ⇒ McDonald's Corporation Common Stock (MCD) [ST]		08/07/2024	P	\$1,001 - \$15,000	
Fidelity Traditional IRA ⇒ Starbucks Corporation - Common Stock (SBUX) [ST]		08/07/2024	P	\$15,001 - \$50,000	
Fidelity Traditional IRA ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]		08/07/2024	P	\$15,001 - \$50,000	
Fidelity Traditional IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]		08/06/2024	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Traditional IRA ⇒ BERKSHIRE HATHAWAY INC COM USD0.0033 CLASS B (BRKB) [OT]  LOCATION: US DESCRIPTION: 75 SHARES OF BRKB @ \$425.30		08/06/2024	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Cisco Systems, Inc. - Common Stock (CSCO) [ST]		08/06/2024	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]		08/06/2024	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Discover Financial Services Common Stock (DFS) [ST]		08/06/2024	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ INVESCO QQQ TR UNIT SER 1 (QQQ) [OT]  LOCATION: US DESCRIPTION: 300 SHARES OF QQQ @ \$443.78		08/06/2024	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ ISHARES CORE S&P SMALL CAP E (IJR) [OT]  LOCATION: US DESCRIPTION: 750 SHARES OF IJR @ \$109.44		08/06/2024	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		08/06/2024	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Kenvue Inc. Common Stock (KVUE) [ST]		08/06/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ LORD ABBETT ULTRA SHORT BOND CL I [OT]  LOCATION: US DESCRIPTION: 12,703.252 SHARES OF LUBYX @ \$10.01		08/06/2024	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		08/06/2024	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ NextEra Energy, Inc. Common Stock (NEE) [ST]		08/06/2024	S	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Pfizer, Inc. Common Stock (PFE) [ST]		08/06/2024	S	\$15,001 - \$50,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Traditional IRA ⇒ Walmart Inc. Common Stock (WMT) [ST]		08/06/2024	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Automatic Data Processing, Inc. - Common Stock (ADP) [ST]		09/24/2024	P	\$50,001 - \$100,000	
Fidelity Traditional IRA ⇒ Illinois Tool Works Inc. Common Stock (ITW) [ST]		09/25/2024	P	\$50,001 - \$100,000	
Fidelity Roth IRA ⇒ Illinois Tool Works Inc. Common Stock (ITW) [ST]		09/25/2024	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Automatic Data Processing, Inc. - Common Stock (ADP) [ST]		09/24/2024	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Chubb Limited Common Stock (CB) [ST]		08/02/2024	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]		08/02/2024	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Starbucks Corporation - Common Stock (SBUX) [ST]		08/14/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Lord Abbott Ultra Short Bond CL I (LUBYX) [OT]  LOCATION: US DESCRIPTION: 660.559 SHARES OF LUBYX @ \$10.01	SP	08/06/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ ISHARES TRUST CORE DIVID GWTH (DGRO) [OT]  LOCATION: US DESCRIPTION: 275 SHARES OF DGRO @ \$58.55	SP	08/06/2024	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ ISHARES CORE S&P SMALL CAP E (IJR) [OT]  LOCATION: US DESCRIPTION: 40 SHARES OF IJR @ \$109.44	SP	08/06/2024	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ ISHARES CORE S&P 500 ETF [OT]  LOCATION: US DESCRIPTION: 80 SHARES OF IVV @ \$529.54	SP	08/06/2024	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>



Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Roth IRA ⇒ FIDELITY QUALITY FACTOR ETF (FQAL) [OT]  LOCATION: US DESCRIPTION: 302 SHARES OF FQAL @ \$59.92	SP	08/06/2024	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ FIDELITY CONTRAFUND [OT]  LOCATION: US DESCRIPTION: 1044.562 SHARES OF FCNTX @ \$18.98	SP	08/06/2024	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ FIDELITY FLOATING HIGH RATE INCOME (FFRHX) [OT]  LOCATION: US DESCRIPTION: 438.596 SHARES OF FFRHX @ \$9.21	SP	08/06/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ FIDELITY NASDAQ COMPOSITE INDEX ETF (ONEQ) [OT]  LOCATION: US DESCRIPTION: 370 SHARES OF ONEQ @ \$65.01	SP	08/06/2024	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Starbucks Corporation - Common Stock (SBUX) [ST]	SP	08/14/2024	S	\$1,001 - \$15,000	<input checked="" 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 C: EARNED INCOME

None disclosed.

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	James C. Franklin, Jr.	December, 2020	Note on two commercial office buildings owned by OK3 Properties, LLC	\$1,000,001 - \$5,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Member	U.S. Naval Academy Board of Visitors
COMMENTS: Designated member by the Speaker of the House of Representatives	

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2020	BRP Group, Inc., Baldwin Krystyn Sherman Partners, LLC, and Lanier Upshaw, Inc.	Rollover Equity granted as part of Baldwin Insurance Group's asset purchase of Lanier Upshaw, Inc. on 1/1/2020. A portion of the purchase price consisted of 389,727 shares of BWIN's Class A Common Stock (NASDAQ: BWIN) at \$15.70 per share, for a value of \$4,902,021.90 at the time of closing. The Rollover Equity Lock-Up Agreement specifies the terms under which these shares can be sold, pledged, transferred, etc.

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?
Aspen Institute	04/01/2024	04/06/2024	Tampa, Florida - Lake Como, Italy - Tampa, Florida	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ripon Society	11/06/2024	11/12/2024	Tampa, Florida - Vienna, Austria - Washington, DC	0	<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

<ul style="list-style-type: none"><li>BRP Colleague, Inc. 401(k)</li><li>Fidelity Traditional IRA</li><li>Fidelity Roth IRA</li><li>Fidelity Roth IRA (Owner: SP)</li><li>Fidelity Joint TBE (Owner: JT) LOCATION: US</li></ul>
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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. Scott Scott Franklin , 07/31/2025