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FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Byron Donalds
Status: Member
State/District: FL19

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2024
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SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Inspira Financial IRA [IH]	SP	\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
Florida Retirement System (ED) ⇒ FRS 2045 Retirement Fund [PE]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Cadence Design Systems, Inc. (CDNS) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Cadence Design Systems, Inc. (CDNS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Cash [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Cash [IH]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Moran Wealth IRA ⇒ Chemed Corp (CHE) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Chemed Corp (CHE) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Deckers Outdoor Corporation (DECK) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Deckers Outdoor Corporation (DECK) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Equifax, Inc. Common Stock (EFX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Equifax, Inc. Common Stock (EFX) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ FactSet Research Systems Inc. (FDS) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ FactSet Research Systems Inc. (FDS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Gartner, Inc. Common Stock (IT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Gartner, Inc. Common Stock (IT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Howmet Aerospace Inc. (HWM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Howmet Aerospace Inc. (HWM) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Intuit Inc. (INTU) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Intuit Inc. (INTU) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
JP Morgan Chase & Co. Common Stock (JPM) [ST]					<input type="checkbox"/>
Moran Wealth IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Lockheed Martin Corporation (LMT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Lockheed Martin Corporation (LMT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Mastercard Incorporated (MA) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Mastercard Incorporated (MA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ McKesson Corporation Common Stock (MCK) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ McKesson Corporation Common Stock (MCK) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Molina Healthcare Inc (MOH) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Moran Wealth IRA ⇒ Molina Healthcare Inc (MOH) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Monolithic Power Systems, Inc. (MPWR) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Monolithic Power Systems, Inc. (MPWR) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ MSCI Inc. Common Stock (MSCI) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ MSCI Inc. Common Stock (MSCI) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Novo Nordisk A/S (NVO) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Novo Nordisk A/S (NVO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Nu Holdings Ltd. Class A Ordinary Shares (NU) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Nu Holdings Ltd. Class A Ordinary Shares (NU) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Parker-Hannifin Corporation (PH) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Parker-Hannifin Corporation (PH) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Regeneron Pharmaceuticals, Inc. (REGN) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Regeneron Pharmaceuticals, Inc. (REGN) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Moran Wealth IRA ⇒ RLI Corp. Common Stock (RLI) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ RLI Corp. Common Stock (RLI) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Trane Technologies plc (TT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Trane Technologies plc (TT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Veeva Systems Inc. Class A (VEEV) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Veeva Systems Inc. Class A (VEEV) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Vertex Pharmaceuticals Incorporated (VRTX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Vertex Pharmaceuticals Incorporated (VRTX) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Zoetis Inc. Class A (ZTS) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Zoetis Inc. Class A (ZTS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Onesto, LLC ⇒ Optima Management Services, LLC [OL] LOCATION: Naples, FL, US DESCRIPTION: Back office services company.	SP	\$1,000,001 - \$5,000,000	None		<input type="checkbox"/>
Onesto, LLC ⇒ OptimaEd, LLC [OL] LOCATION: Naples, FL, US DESCRIPTION: Curriculum development company	SP	\$500,001 - \$1,000,000	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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Moran Wealth IRA ⇒ McKesson Corporation Common Stock (MCK) [ST]		10/01/2024	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Nu Holdings Ltd. Class A Ordinary Shares (NU) [ST]		10/01/2024	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Synopsys, Inc. - Common Stock (SNPS) [ST]		10/01/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ AppFolio, Inc. - Class A Common Stock (APPF) [ST]		10/01/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ McKesson Corporation Common Stock (MCK) [ST]	SP	10/01/2024	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Nu Holdings Ltd. Class A Ordinary Shares (NU) [ST]	SP	10/01/2024	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ AppFolio, Inc. - Class A Common Stock (APPF) [ST]	SP	10/01/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Synopsys, Inc. - Common Stock (SNPS) [ST]	SP	10/01/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		02/22/2024	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Bristol-Myers Squibb Company Common Stock (BMY) [ST]		02/22/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ General Motors Company Common Stock (GM) [ST]		02/22/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Humana Inc. Common Stock (HUM) [ST]		02/22/2024	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Ingersoll Rand Inc. Common Stock (IR) [ST]		02/22/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒	SP	03/27/2024	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
AppFolio, Inc. - Class A Common Stock (APPF) [ST]					
Moran Wealth IRA ⇒ Deckers Outdoor Corporation (DECK) [ST]	SP	03/27/2024	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Dynatrace, Inc. Common Stock (DT) [ST]	SP	03/27/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Humana Inc. Common Stock (HUM) [ST]	SP	03/27/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Sony Group Corporation American Depositary Shares (SONY) [ST]	SP	03/27/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Synopsys, Inc. - Common Stock (SNPS) [ST]	SP	03/27/2024	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ AppFolio, Inc. - Class A Common Stock (APPF) [ST]		03/27/2024	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Deckers Outdoor Corporation (DECK) [ST]		03/27/2024	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Dynatrace, Inc. Common Stock (DT) [ST]		03/27/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Humana Inc. Common Stock (HUM) [ST]		03/27/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Sony Group Corporation American Depositary Shares (SONY) [ST]		03/27/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Synopsys, Inc. - Common Stock (SNPS) [ST]		03/27/2024	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Equifax, Inc. Common Stock (EFX) [ST]	SP	05/09/2024	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Monster Beverage Corporation - Common Stock (MNST) [ST]	SP	05/09/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Moran Wealth IRA ⇒ Monster Beverage Corporation - Common Stock (MNST) [ST]		05/09/2024	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Equifax, Inc. Common Stock (EFX) [ST]		05/09/2024	P	\$1,001 - \$15,000	

* 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

Source	Type	Amount
OptimaEd, LLC	Spouse Salary	N/A
OptimaEd, LLC	Spouse Business Income	N/A
Optima Management Services, LLC	Spouse Business Income	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Chase Bank	January 2021	Credit Card	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- Moran Wealth IRA
- Florida Retirement System (ED) (Owner: SP)
- Moran Wealth IRA (Owner: SP)
- Onesto, LLC (100% Interest) (Owner: SP)
LOCATION: US
DESCRIPTION: Onesto, LLC is a holding company in which Filer's spouse is sole member.

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. Byron Donalds , 08/13/2025