



Filing ID #10062451

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Michael Davey  
**Status:** Congressional Candidate  
**State/District:** FL27

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 07/20/2024  
**Period Covered:** 01/01/2023– 06/21/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Funds Corporate Bond Fund - Class F-2 (BFCGX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
American Funds Corporate Bond Fund - Class F-2 (BFCGX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
American Funds Strategic Bond Fund Class F-2 (ANBFX) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
American Funds Strategic Bond Fund Class F-2 (ANBFX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$201 - \$1,000
American Mutual Fund, Class F-2 Shares (AMRFX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
American Mutual Fund, Class F-2 Shares (AMRFX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
Checking Acct [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
EuroPacific Growth Fund, Class F-2 Shs (AEPFX)		\$1,001 - \$15,000	Capital Gains,	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year	
[MF]			Dividends, Interest			
EuroPacific Growth Fund, Class F-2 Shs (AEPFX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200	
Harbor Small Cap Value Fund Insti Cl (HASCX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200	
Harbor Small Cap Value Fund Insti Cl (HASCX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200	
Intermediate Bond Fund of America, Class F-2 Shs (IBAFX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000	
Intermediate Bond Fund of America, Class F-2 Shs (IBAFX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200	
iShares 0-3 Month Treasury Bond ETF (SGOV) [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200	
iShares 0-5 Year TIPS Bond ETF (STIP) [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000	
iShares 1-3 Year Treasury Bond ETF (SHY) [EF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000	
iShares Core MSCI EAFE ETF (IEFA) [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	None	None	
iShares Core S&P 500 ETF (IVV) [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200	
iShares Core S&P Mid-Cap ETF (IJH) [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200	
iShares Core S&P Small-Cap ETF (IJR) [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200	
iShares Core U.S. Aggregate Bond ETF (AGG) [EF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000	
iShares Gold Trust Shares of the iShares Gold Trust (IAU) [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200	

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
iShares Treasury Floating Rate Bond ETF (TFLO) [EF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$1,001 - \$2,500
John Hancock Fds III Disciplined Value Mid Cap Fd Class I (JVMIX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
John Hancock Fds III Disciplined Value Mid Cap Fd Class I (JVMIX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
Law Firm Bank Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Loan to Campaign [DO]		\$100,001 - \$250,000	None		
Money Market IRA [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Personal Checking Account [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Rhondas Way Property [RP]	SP	\$15,001 - \$50,000	None		
LOCATION: Elijay, GA, US					
Savings Acct [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
SMALLCAP World Fund, Inc., Class F-2 Shs (SMCFX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
SMALLCAP World Fund, Inc., Class F-2 Shs (SMCFX) [MF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
SPDR Bloomberg 1-10 Year TIPS ETF (TIPX) [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
SPDR S&P Aerospace & Defense ETF (XAR) [EF]	JT	\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
SPDR Select Sector Fund - Health Care (XLV) [EF]	JT	\$1,001 - \$15,000	Dividends, Interest	\$1 - \$200	\$1 - \$200
The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
The Bond Fd of America, Class F-2 Shares (ABNFX) [MF]		\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000

<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>
The Growth Fund of America Class F-2 Shares (GFFFX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
The Growth Fund of America Class F-2 Shares (GFFFX) [MF]	JT	\$15,001 - \$50,000	Dividends, Interest	\$1 - \$200	\$1 - \$200
The Investment Company of America, Class F-2 Shs (ICAFX) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$201 - \$1,000	\$201 - \$1,000
The Investment Company of America, Class F-2 Shs (ICAFX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
Washington Mutual Investors Fund Cl F-2 Shs (WMFFX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200
Washington Mutual Investors Fund Cl F-2 Shs (WMFFX) [MF]	JT	\$15,001 - \$50,000	Capital Gains, Dividends, Interest	\$1 - \$200	\$1 - \$200

\* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

### SCHEDULE C: EARNED INCOME

<b>Source</b>	<b>Type</b>	<b>Amount Current Year to Filing</b>	<b>Amount Preceding Year</b>
Law Offices of Michael W Davey, PLLC	Fees for Legal Services	\$70,394.38	\$157,585.50
Miami Dade County Public Schools	Spouse's Salary	\$36,635.21	\$50,219.45

### SCHEDULE D: LIABILITIES

<b>Owner</b>	<b>Creditor</b>	<b>Date Incurred</b>	<b>Type</b>	<b>Amount of Liability</b>
JT	Mr. Cooper	February 2013	Mortgage	\$250,001 - \$500,000
	Citibank	June 2024	Credit Card Debt	\$15,001 - \$50,000

### SCHEDULE E: POSITIONS

<b>Position</b>	<b>Name of Organization</b>
Mayor	Village of Key Biscayne
Trustee	Key Biscayne Chamber of Commerce

Boardmember

The Pyramids Condominium Association

## **SCHEDULE F: AGREEMENTS**

None disclosed.

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

None disclosed.

## **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:** Michael Davey , 07/20/2024