



Filing ID #10059740

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Robert S. Weinroth  
**Status:** Congressional Candidate  
**State/District:** FL23

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 07/12/2024  
**Period Covered:** 01/01/2023– 06/14/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Cash held in Brokerage Acct					
Charles Schwab 9772 ⇒ AST SpaceMobile, Inc. - Class A Common Stock (ASTS) [ST]		\$1,001 - \$15,000	None		
Charles Schwab 9772 ⇒ Beyond, Inc. Common Stock (BYON) [ST]		\$1,001 - \$15,000	None		
Charles Schwab 9772 ⇒ Immutep Limited - American Depository Shares (IMMP) [ST]		\$1,001 - \$15,000	None		
Charles Schwab 9772 ⇒ Li Auto Inc. - American Depository Shares (LI) [ST]		\$1,001 - \$15,000	None		
Charles Schwab 9772 ⇒ Robinhood Markets, Inc. - Class A Common Stock (HOOD) [ST]		\$1,001 - \$15,000	None		
Charles Schwab 9772 ⇒		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Southwest Airlines Company Common Stock (LUV) [ST]					
CS 1473 (Bob's Rollover IRA) ⇒ Ally FINL INC. 5.25% [CS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Ally FINL INC. 5.25% Maturity 9/30/24					
CS 1473 (Bob's Rollover IRA) ⇒ ARROW ELECTRONICS 7.5% [CS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: ARROW ELECTRONICS 7.5% MATURITY: 1/15/27					
CS 1473 (Bob's Rollover IRA) ⇒ CITIGROUP INC. 4.3% [CS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
DESCRIPTION: CITIGROUP INC. 4.3% MATURITY: 11/20/26					
CS 1473 (Bob's Rollover IRA) ⇒ DEUTSCHE BK AG L 4.1% [CS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
DESCRIPTION: DEUTSCHE BK AG L 4.1% MATURITY: 1/13/26					
CS 1473 (Bob's Rollover IRA) ⇒ FIRST CITIZENS 6.125% [CS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
DESCRIPTION: FIRST CITIZENS 6.125% MATURITY: 3/09/28					
CS 1473 (Bob's Rollover IRA) ⇒ GENERAL MOTORS FL 4.3% [CS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: GENERAL MOTORS FL 4.3% MATURITY: 7/13/25					
CS 1473 (Bob's Rollover IRA) ⇒ HASBRO INC 6.6% [CS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
DESCRIPTION: HASBRO INC 6.6% MATURITY: 07/15/28					
CS 1473 (Bob's Rollover IRA) ⇒ HCA HEALTHCARE 7.05% [CS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: HCA HEALTHCARE 7.05% MATURITY: 12/01/27					
CS 1473 (Bob's Rollover IRA) ⇒ JPMorgan Ultra-Short Income ETF (JPST) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
CS 1473 (Bob's Rollover IRA) ⇒ Materials Select Sector SPDR (XLB) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
CS 1473 (Bob's Rollover IRA) ⇒ MORGAN STANLEY 3.95% [CS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: MORGAN STANLEY 3.95% MATURITY: 4/23/27					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
CS 1473 (Bob's Rollover IRA) ⇒ ORIX CORP 5% [CS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: ORIX CORP 5% MATURITY: 9/13/27					
CS 1473 (Bob's Rollover IRA) ⇒ Real Estate Select Sector SPDR Fund (XLRE) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
CS 1473 (Bob's Rollover IRA) ⇒ Schwab Value Advantage Money Fund (SWVXX) [MF]		\$1,001 - \$15,000	None		
CS 1473 (Bob's Rollover IRA) ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
CS 1473 (Bob's Rollover IRA) ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
CS 1473 (Bob's Rollover IRA) ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
CS 1473 (Bob's Rollover IRA) ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
CS 1473 (Bob's Rollover IRA) ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
CS 1473 (Bob's Rollover IRA) ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
CS 1473 (Bob's Rollover IRA) ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		\$50,001 - \$100,000	Dividends	\$1 - \$200	\$201 - \$1,000
CS 1473 (Bob's Rollover IRA) ⇒ SPDR Select Sector Fund - Utilities (XLU) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
CS 1473 (Bob's Rollover IRA) ⇒ The BOEING CO 7.25% [CS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: The BOEING CO 7.25% Maturity: 6/15/25					
CS 1473 (Bob's Rollover IRA) ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
CS 1473 (Bob's Rollover IRA) ⇒ THE GOLDMAN SACH 4.25% [CS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: THE GOLDMAN SACH 4.25% MATURITY: 10/21/25					
CS 1473 (Bob's Rollover IRA) ⇒ WHOLE FOODS MARKET 5.2% [CS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
DESCRIPTION: WHOLE FOODS MARKET 5.2% MATURITY: 9/03/25					
CS 9554 (Pam's IRA) ⇒ ALLY FINL INC 4.625 [CS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: ALLY FINL INC 4.625					
CS 9554 (Pam's IRA) ⇒ Ally FINL INC. 5.25% [CS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: Ally FINL INC. 5.25% Maturity 9/30/24					
CS 9554 (Pam's IRA) ⇒ BANK OF AMERICA 4.25% [CS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: BANK OF AMERICA 4.25%					
CS 9554 (Pam's IRA) ⇒ DEUTSCHE BK AG5.371% [CS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: DEUTSCHE BK AG5.371%					
CS 9554 (Pam's IRA) ⇒ FIRST CITIZENS 6.125% [CS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: FIRST CITIZENS 6.125%					
CS 9554 (Pam's IRA) ⇒ HASBRO INC 6.6% [CS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000
DESCRIPTION: HASBRO INC 6.6%					
CS 9554 (Pam's IRA) ⇒ JPMorgan Ultra-Short Income ETF (JPST) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
CS 9554 (Pam's IRA) ⇒ KEYCORP 4.15% [CS]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
DESCRIPTION: KEYCORP 4.15%					
CS 9554 (Pam's IRA) ⇒ Materials Select Sector SPDR (XLB) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
CS 9554 (Pam's IRA) ⇒ MORGAN STANLEY 3.95% [CS]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: MORGAN STANLEY 3.95%					
CS 9554 (Pam's IRA) ⇒ Real Estate Select Sector SPDR Fund (XLRE) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
CS 9554 (Pam's IRA) ⇒ SPDR Select Sector Fund - Consumer Discretionary (XLY) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
CS 9554 (Pam's IRA) ⇒ SPDR Select Sector Fund - Consumer Staples (XLP) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
CS 9554 (Pam's IRA) ⇒ SPDR Select Sector Fund - Energy Select Sector (XLE) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
CS 9554 (Pam's IRA) ⇒ SPDR Select Sector Fund - Financial (XLF) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
CS 9554 (Pam's IRA) ⇒ SPDR Select Sector Fund - Health Care (XLV) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
CS 9554 (Pam's IRA) ⇒ SPDR Select Sector Fund - Industrial (XLI) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
CS 9554 (Pam's IRA) ⇒ SPDR Select Sector Fund - Technology (XLK) [EF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
CS 9554 (Pam's IRA) ⇒ SPDR Select Sector Fund - Utilities (XLU) [EF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
CS 9554 (Pam's IRA) ⇒ SUNTRUST BANKS, INC 6% [CS]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$201 - \$1,000
DESCRIPTION: SUNTRUST BANKS, INC 6%					
CS 9554 (Pam's IRA) ⇒ The Communication Services Select Sector SPDR Fund (XLC) [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Florida Retirement System [PE]		Undetermined	None		
Fundrise ⇒ Fundrise Balanced eREIT II [RE]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fundrise ⇒ Fundrise Development eREIT [RE]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Fundrise ⇒ Fundrise eFund [OL]		\$1,001 - \$15,000	Dividends, Interest, Rent	\$1 - \$200	\$1 - \$200
LOCATION: Washington DC, DC, US DESCRIPTION: Partnership					
Fundrise ⇒ Fundrise Flagship Real Estate Fund [RE]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Fundrise ⇒ Fundrise Growth eREIT [RE]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Fundrise ⇒ Fundrise Growth eREIT II [RE]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Fundrise ⇒ Fundrise Income Real Estate Fund [RE]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
John Hancock Pam ⇒ John Hancock Variable Insurance Trust Managed Volatility Growth Portfolio Series 1 (JELGX) [MF]		\$15,001 - \$50,000	Dividends, Interest	\$1,001 - \$2,500	\$2,501 - \$5,000
Morgan Stanley 7917 ⇒ 3M Company Common Stock (MMM) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley 7917 ⇒ AbbVie Inc. Common Stock (ABBV) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley 7917 ⇒ Alphabet Inc. - Class A Common Stock (GOOGL) [ST]		\$15,001 - \$50,000	None		
Morgan Stanley 7917 ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$15,001 - \$50,000	None		
Morgan Stanley 7917 ⇒ American International Group, Inc. New Common Stock (AIG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley 7917 ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley 7917 ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley 7917 ⇒ AT&T Inc. Depository Shares, each representing a 1/1,000th interest in a share of 4.750% Perpetual P (T\$C) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Morgan Stanley 7917 ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Morgan Stanley 7917 ⇒ Chevron Corporation Common Stock (CVX) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Morgan Stanley 7917 ⇒ Cisco Systems, Inc. - Common Stock (CSCO) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley 7917 ⇒ Coca-Cola Company (KO) [ST]		\$15,001 - \$50,000	Capital Gains	None	\$1,001 - \$2,500
Morgan Stanley 7917 ⇒ Corteva, Inc. Common Stock (CTVA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Morgan Stanley 7917 ⇒ Dow Inc. Common Stock (DOW) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Morgan Stanley 7917 ⇒ Elevance Health, Inc. Common Stock (ELV) [ST]		\$1,001 - \$15,000	Dividends	None	\$201 - \$1,000
Morgan Stanley 7917 ⇒ Eli Lilly and Company Common Stock (LLY) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley 7917 ⇒ Exxon Mobil Corporation Common Stock (XOM) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley 7917 ⇒ Hartford Financial Services Group, Inc. (HIG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley 7917 ⇒ Intel Corporation - Common Stock (INTC) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley 7917 ⇒ International Business Machines Corporation Common Stock (IBM) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley 7917 ⇒ Janus Henderson AAA CLO ETF (JAAA) [EF]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
Morgan Stanley 7917 ⇒ JetBlue Airways Corporation - Common Stock (JBLU) [ST]		\$1,001 - \$15,000	None		
Morgan Stanley 7917 ⇒ Johnson & Johnson Common Stock (JNJ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Morgan Stanley 7917 ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley 7917 ⇒ Lowe's Companies, Inc. Common Stock (LOW) [ST]		\$1,001 - \$15,000	Capital Gains	None	None
Morgan Stanley 7917 ⇒ Marriott International - Class A Common Stock (MAR) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley 7917 ⇒ Mastercard Incorporated Common Stock (MA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley 7917 ⇒ MercadoLibre, Inc. - Common Stock (MELI) [ST]		\$15,001 - \$50,000	None		
Morgan Stanley 7917 ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	None	\$5,001 - \$15,000
Morgan Stanley 7917 ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
Morgan Stanley 7917 ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Morgan Stanley 7917 ⇒ Morgan Stanley Institutional Liquidity Funds [BA]		\$15,001 - \$50,000	Dividends	None	\$2,501 - \$5,000
DESCRIPTION: Morgan Stanley Institutional Liquidity Funds					
Morgan Stanley 7917 ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$100,001 - \$250,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley 7917 ⇒ Palo Alto Networks, Inc. (PANW) [ST]		\$50,001 - \$100,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Morgan Stanley 7917 ⇒ SPDR S&P 500 (SPY) [EF]		\$50,001 - \$100,000	Capital Gains	None	None
Morgan Stanley 7917 ⇒ Take-Two Interactive Software, Inc. - Common Stock (TTWO) [ST]		\$1,001 - \$15,000	None		
Morgan Stanley 7917 ⇒ Tesla, Inc. - Common Stock (TSLA) [ST]		\$15,001 - \$50,000	None		
Morgan Stanley 7917 ⇒ TJX Companies, Inc. (TJX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley 7917 ⇒ Uber Technologies, Inc. Common Stock (UBER) [ST]		\$15,001 - \$50,000	None		
Morgan Stanley 7917 ⇒ Verizon Communications Inc. Common Stock (VZ) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$201 - \$1,000
Morgan Stanley 7917 ⇒ Walgreens Boots Alliance, Inc. - Common Stock (WBA) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley 7917 ⇒ Walmart Inc. Common Stock (WMT) [ST]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1 - \$200	\$1 - \$200
Morgan Stanley 7917 ⇒ Morgan Stanley 9289 ⇒ Annaly Capital Management Inc 6.750% Series I Fixed-to-Floating Rate Cumulative Redeemable Preferred (NLY\$I) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Morgan Stanley 7917 ⇒ Morgan Stanley 9289 ⇒ Cleveland-Cliffs Inc. REGS [CS]		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
DESCRIPTION: Corporate Bond of Cleveland-Cliffs Inc. Matures 3/01/31					
Morgan Stanley 7917 ⇒ Morgan Stanley 9289 ⇒ Pacific Gas & Electric Co. 4.36% 1st Preferred Stock (PCG\$I) [ST]		\$15,001 - \$50,000	Non Dividend Distributions	None	\$1,001 - \$2,500
Morgan Stanley 7917 ⇒ Morgan Stanley 9289 ⇒ Prospect Capital Corporation 5.35% Series A Fixed Rate Cumulative Perpetual Preferred Stock (PSEC\$A) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	\$1,001 - \$2,500
Morgan Stanley 7917 ⇒ Morgan Stanley 9289 ⇒		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Salesforce, Inc. Common Stock (CRM) [ST]					
Morgan Stanley 7917 ⇒ Morgan Stanley 9289 ⇒ South Jersey Industries, Inc. 5.625% Junior Subordinated Notes due 2079 (SJIJ) [ST]		\$15,001 - \$50,000	Interest	None	\$1,001 - \$2,500
Morgan Stanley 7917 ⇒ Morgan Stanley 9289 ⇒ Synchrony Financial Depository Shares, each Representing a 1/40th Interest in a Share of 5.625% Fixe (SYF\$A) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Morgan Stanley 7917 ⇒ Morgan Stanley 9289 ⇒ United States Cellular Corporation 5.500% Senior Notes due 2070 (UZE) [ST]		\$15,001 - \$50,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Morgan Stanley 7917 ⇒ Morgan Stanley 9289 ⇒ Wells Fargo CO DEP PFD 4.7 C-A (WFC.A) [CS]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
DESCRIPTION: Wells Fargo CO DEP PFD 4.7 C-A (WFC.A)					
Morgan Stanley Bank [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: Cash held in Brokerage Accts					
North American Company for Life and Health Insurance [FN]		\$15,001 - \$50,000	None		
Pacific Life Pam ⇒ Pacific Life Portfolio Optimization Growth [OT]		\$50,001 - \$100,000	Dividends, Interest	\$2,501 - \$5,000	\$5,001 - \$15,000
DESCRIPTION: Pacific Life Portfolio Optimization Growth					
Pacific Life Robert ⇒ Pacific Life Portfolio Optimization Growth [OT]		\$50,001 - \$100,000	Dividends, Interest	\$2,501 - \$5,000	\$5,001 - \$15,000
DESCRIPTION: Pacific Life Portfolio Optimization Growth					
PJW CONSULTING LLC, 100% Interest [OL]	SP	\$1 - \$1,000	None		
LOCATION: Palm Beach, FL, US					
DESCRIPTION: Sch C Business					
Prudential Pam ⇒ AST MULTI-SECTOR FIXED INCOME [CS]		\$250,001 - \$500,000	Interest	\$5,001 - \$15,000	\$15,001 - \$50,000
DESCRIPTION: AST MULTI-SECTOR FIXED INCOME VARIABLE ANNUITY					
Prudential Robert ⇒ AST MULTI-SECTOR FIXED INCOME [CS]		\$250,001 - \$500,000	Interest	\$5,001 - \$15,000	\$15,001 - \$50,000
DESCRIPTION: AST MULTI-SECTOR FIXED INCOME VARIABLE ANNUITY					

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Public Service Enterprise Group Incorporated Common Stock (PEG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
SOUTH FLORIDA BUSINESS STRATEGIES, 100% Interest [OL]		\$1 - \$1,000	None		
LOCATION: Palm Beach, FL, US DESCRIPTION: Management Consulting Sch C Business					
State Street Retiree for American International Group [PE]		Undetermined	None		
Wells Fargo Bank Accounts [BA]	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: PJW Savings Acct					
Wells Fargo Crown Classic Banking [BA]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200

\* 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 Current Year to Filing	Amount Preceding Year
PJW CONSULTING INC	Spouse Self Employed Income	N/A	\$15,815.00
SOUTH FLORIDA BUSINESS STRATEGIES	Candidate Self Employed Income	N/A	\$24,500.00
AMERICAN INTERNATIONAL GROUP INC	RETIREMENT	\$6,216.78	\$12,433.56
PRUO LIFE INSURANCE CO	IRA	\$13,034.00	\$26,068.00
PRUO LIFE INSURANCE CO	SPOUSE IRA	\$11,720.50	\$23,441.00
JOHN HANCOCK LIFE INS. CO. (U.S.A.) US ANNUITY TAX TEAM	SPOUSE IRA	\$2,116.00	\$4,232.00
CHARLES SCHWAB & CO., INC.	ROLLOVER IRA	\$16,023.50	\$32,047.00
Florida Retirement System	RETIREMENT	\$6,314.65	\$15,966.00
NORTH AMERICAN COMPANY FOR LIFE AND HEALTH	CANDIDATE ANNUITY	N/A	\$23,506.08

## INSURANCE

## PAYOUT

**SCHEDULE D: LIABILITIES**

Owner	Creditor	Date Incurred	Type	Amount of Liability
	BMW FINANCIAL SERVICES	Jun 12, 2022	Auto Loan	\$50,001 - \$100,000
	BMW FINANCIAL SERVICES	Dec 23, 2021	Auto Loan	\$15,001 - \$50,000
JT	AMEX	Jun, 2022	CREDIT CARD	\$50,001 - \$100,000
JT	JPMCB	SEPT 2022	CREDIT CARD	\$15,001 - \$50,000
SP	HYUNDAI	JUN, 2022	Auto Loan	\$10,000 - \$15,000

**SCHEDULE E: POSITIONS**

Position	Name of Organization
Manager	South Florida Business Strategies
Mayor	Palm Beach County

**SCHEDULE F: AGREEMENTS**

Date	Parties To	Terms of Agreement
July 2017	Candidate and American International Group	Pension between Candidate and former employer per their employment agreement after 10 years vesting
December 2022	Candidate and State of Florida	Pension between Candidate and former employer per their employment agreement after 8 years of vesting

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

None disclosed.

**SCHEDULE A INVESTMENT VEHICLE DETAILS**

- Charles Schwab 9772
- CS 1473 (Bob's Rollover IRA)
- CS 9554 (Pam's IRA)
- Fundrise
- John Hancock Pam

- Morgan Stanley 7917
- Morgan Stanley 7917 ⇒ Morgan Stanley 9289  
DESCRIPTION: MS 9289 has assets transferred from MS 7917 partway through 2023
- Pacific Life Pam
- Pacific Life Robert
- Prudential Pam
- Prudential Robert

## **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:** Robert S. Weinroth , 07/12/2024