



Filing ID #10053297

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

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

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2022  
**Filing Date:** 07/29/2023

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of Central Florida Checking Accounts [BA]	JT	\$100,001 - \$250,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
BRP Colleague, Inc. 401(k) ⇒ Vanguard 500 Index Fund [MF] DESCRIPTION: Employer 401(k) Plan. 100% invested in VFIAX (Large Blend).		\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
BRP Group, Inc. - Class A (BRP) [ST]		\$5,000,001 - \$25,000,000	None		<input type="checkbox"/>
Fidelity Joint TBE ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	JT	\$50,001 - \$100,000	None		<input type="checkbox"/>
Fidelity Joint TBE ⇒ Apple Inc. (AAPL) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	JT	\$100,001 - \$250,000	None		<input type="checkbox"/>
Fidelity Joint TBE ⇒ Cisco Systems, Inc. (CSCO) [ST]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Joint TBE ⇒	JT	\$50,001 -	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Comcast Corporation - Class A (CMCSA) [ST]		\$100,000			<input type="checkbox"/>
Fidelity Joint TBE ⇒ Discover Financial Services (DFS) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ FDIC Bank Deposit Sweep Not Covered by SIP [BA]	JT	\$250,001 - \$500,000	Interest	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Joint TBE ⇒ FIDZX [MF]	JT	None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ FMCSX [MF]	JT	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<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 ⇒ IJR [EF]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Johnson & Johnson (JNJ) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Joint TBE ⇒ JP Morgan Chase & Co. (JPM) [ST]	JT	\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ McDonald's Corporation (MCD) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Microsoft Corporation (MSFT) [ST]	JT	\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ NextEra Energy, Inc. (NEE) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Pepsico, Inc. (PEP) [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 ⇒ Pfizer, Inc. (PFE) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Joint TBE ⇒ PNC Financial Services Group, Inc. (PNC) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<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 ⇒ QQQ [EF]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Starbucks Corporation (SBUX) [ST]	JT	\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Joint TBE ⇒ United Parcel Service, Inc. (UPS) [ST]	JT	\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Joint TBE ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Verizon Communications Inc. (VZ) [ST]	JT	\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<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. (WMT) [ST]	JT	\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Roth IRA ⇒ American Electric Power Company, Inc. (AEP) [ST]		None	Capital Gains, Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Roth IRA ⇒		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Cisco Systems, Inc. (CSCO) [ST]					
Fidelity Roth IRA ⇒ DGRO [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Discover Financial Services (DFS) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ FBKWX [EF]		None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ FCNTX [MF]	SP	\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Roth IRA ⇒ FDIC Bank Deposit Sweep Not Covered by SIP [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ FDIC Bank Deposit Sweep Not Covered by SIP [BA]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ FIDZX [MF]		None	Capital Gains	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ FIDZX [MF]	SP	None	Capital Gains	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ FMCSX [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ FMCSX [MF]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ FQAL [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ FSKAX [MF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Home Depot, Inc. (HD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ IJR [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Roth IRA ⇒ IJR [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ IVV [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Johnson & Johnson (JNJ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Lockheed Martin Corporation (LMT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ LUBYX [MF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ LUBYX [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ McDonald's Corporation (MCD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ NextEra Energy, Inc. (NEE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ ONEQ [EF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Pepsico, Inc. (PEP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Pfizer, Inc. (PFE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Roth IRA ⇒ PNC Financial Services Group, Inc. (PNC) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ QQQ [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ SHYG [EF]		None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Starbucks Corporation (SBUX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ United Parcel Service, Inc. (UPS) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input 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 ⇒ Verizon Communications Inc. (VZ) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Visa Inc. (V) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Walmart Inc. (WMT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$50,001 - \$100,000	None		<input type="checkbox"/>
Fidelity Traditional IRA ⇒ American Electric Power Company, Inc. (AEP) [ST]		None	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Apple Inc. (AAPL) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$50,001 - \$100,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Traditional IRA ⇒ Cisco Systems, Inc. (CSCO) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Discover Financial Services (DFS) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ FBKWX [MF]		None	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ FDIC Bank Deposit Sweep Not Covered by SIP [BA]		\$100,001 - \$250,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ FIDZX [MF]		\$100,001 - \$250,000	Capital Gains	\$5,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ FMCSX [MF]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ FSKAX [MF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Home Depot, Inc. (HD) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ IJR [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Johnson & Johnson (JNJ) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Lockheed Martin Corporation (LMT) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ LUBYX [MF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ McDonald's Corporation (MCD) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Traditional IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Microsoft Corporation (MSFT) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ NextEra Energy, Inc. (NEE) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Pepsico, Inc. (PEP) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Pfizer, Inc. (PFE) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ PNC Financial Services Group, Inc. (PNC) [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 ⇒ QQQ [EF]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ SHYG [EF]		None	Dividends	\$2,501 - \$5,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Starbucks Corporation (SBUX) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ United Parcel Service, Inc. (UPS) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Verizon Communications Inc. (VZ) [ST]		\$15,001 - \$50,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Visa Inc. (V) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>



Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Traditional IRA ⇒ Walmart Inc. (WMT) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
OK3 Capital Holdings, LLC [BA]		\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Checking account associated with this LLC.					
OK3 Properties, LLC [RP]		\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Lakeland/Polk, FL, US DESCRIPTION: Asset in LLC is a commercial office building at 1115 Bartow Rd., Lakeland, FL 33801					
OK3 Properties, LLC [RP]		\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Lakeland/Polk, FL, US DESCRIPTION: Asset in LLC is a commercial office building at 1129 Bartow Rd., Lakeland, FL 33801.					
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 class 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 ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	JT	03/21/2022	P	\$15,001 - \$50,000	
Fidelity Joint TBE ⇒ American Electric Power Company, Inc. (AEP) [ST]	JT	03/10/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Apple Inc. (AAPL) [ST]	JT	03/21/2022	P	\$15,001 - \$50,000	
Fidelity Joint TBE ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	JT	03/21/2022	P	\$50,001 - \$100,000	
Fidelity Joint TBE ⇒ Cisco Systems, Inc. (CSCO) [ST]	JT	03/21/2022	P	\$50,001 - \$100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Joint TBE ⇒ Comcast Corporation - Class A (CMCSA) [ST]	JT	03/21/2022	P	\$50,001 - \$100,000	
Fidelity Joint TBE ⇒ Discover Financial Services (DFS) [ST]	JT	03/10/2022	P	\$15,001 - \$50,000	
Fidelity Joint TBE ⇒ FIDZX [MF]	JT	03/10/2022	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ FMCSX [MF]	JT	03/21/2022	P	\$50,001 - \$100,000	
Fidelity Joint TBE ⇒ IJR [EF]	JT	03/21/2022	P	\$50,001 - \$100,000	
Fidelity Joint TBE ⇒ JP Morgan Chase & Co. (JPM) [ST]	JT	03/21/2022	P	\$50,001 - \$100,000	
Fidelity Joint TBE ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]	JT	03/15/2022	P	\$15,001 - \$50,000	
Fidelity Joint TBE ⇒ Microsoft Corporation (MSFT) [ST]	JT	03/21/2022	P	\$50,001 - \$100,000	
Fidelity Joint TBE ⇒ PNC Financial Services Group, Inc. (PNC) [ST]	JT	03/10/2022	P	\$15,001 - \$50,000	
Fidelity Joint TBE ⇒ QQQ [EF]	JT	03/21/2022	P	\$50,001 - \$100,000	
Fidelity Joint TBE ⇒ Starbucks Corporation (SBUX) [ST]	JT	03/21/2022	P	\$50,001 - \$100,000	
Fidelity Joint TBE ⇒ Starbucks Corporation (SBUX) [ST]	JT	03/10/2022	P	\$15,001 - \$50,000	
Fidelity Joint TBE ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	JT	03/11/2022	P	\$15,001 - \$50,000	
Fidelity Joint TBE ⇒ Verizon Communications Inc. (VZ) [ST]	JT	03/21/2022	P	\$15,001 - \$50,000	
Fidelity Joint TBE ⇒	JT	03/15/2022	P	\$15,001 - \$50,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Verizon Communications Inc. (VZ) [ST]					
Fidelity Joint TBE ⇒ Visa Inc. (V) [ST]	JT	03/10/2022	P	\$15,001 - \$50,000	
Fidelity Joint TBE ⇒ Walmart Inc. (WMT) [ST]	JT	03/11/2022	P	\$15,001 - \$50,000	
Fidelity Roth IRA ⇒ American Electric Power Company, Inc. (AEP) [ST]		03/10/2022	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Cisco Systems, Inc. (CSCO) [ST]		09/13/2022	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ DGRO [EF]	SP	03/11/2022	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ FBKWX [MF]		09/8/2022	S	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ FBKWX [MF]	SP	09/9/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ FCNTX [MF]	SP	09/13/2022	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ FIDZX [MF]		03/10/2022	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ FIDZX [MF]	SP	03/10/2022	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ FQAL [EF]	SP	03/11/2022	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Home Depot, Inc. (HD) [ST]		09/9/2022	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ IVV [EF]	SP	09/13/2022	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Lockheed Martin Corporation (LMT) [ST]		09/12/2022	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Roth IRA ⇒ LUBYX [MF]		09/9/2022	P	\$15,001 - \$50,000	
Fidelity Roth IRA ⇒ LUBYX [MF]	SP	09/9/2022	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]		09/13/2022	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ ONEQ [EF]	SP	09/13/2022	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ SHYG [EF]		11/22/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ SHYG [EF]	SP	11/22/2022	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Starbucks Corporation (SBUX) [ST]		09/9/2022	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		03/11/2022	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Verizon Communications Inc. (VZ) [ST]		03/11/2022	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Walmart Inc. (WMT) [ST]		09/13/2022	P	\$1,001 - \$15,000	
Fidelity Traditional IRA ⇒ American Electric Power Company, Inc. (AEP) [ST]		03/10/2022	S	\$50,001 - \$100,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Cisco Systems, Inc. (CSCO) [ST]		09/13/2022	P	\$15,001 - \$50,000	
Fidelity Traditional IRA ⇒ FBKWX [MF]		09/8/2022	S	\$100,001 - \$250,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ FIDZX [MF]		03/10/2022	S	\$100,001 - \$250,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Traditional IRA ⇒ Home Depot, Inc. (HD) [ST]		09/9/2022	P	\$15,001 - \$50,000	
Fidelity Traditional IRA ⇒ Lockheed Martin Corporation (LMT) [ST]		09/12/2022	P	\$50,001 - \$100,000	
Fidelity Traditional IRA ⇒ LUBYX [MF]		09/9/2022	P	\$100,001 - \$250,000	
Fidelity Traditional IRA ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]		09/13/2022	P	\$15,001 - \$50,000	
Fidelity Traditional IRA ⇒ Microsoft Corporation (MSFT) [ST]		09/13/2022	P	\$15,001 - \$50,000	
Fidelity Traditional IRA ⇒ SHYG [EF]		11/22/2022	S	\$50,001 - \$100,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Starbucks Corporation (SBUX) [ST]		09/9/2022	P	\$15,001 - \$50,000	
Fidelity Traditional IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		03/11/2022	P	\$15,001 - \$50,000	
Fidelity Traditional IRA ⇒ Verizon Communications Inc. (VZ) [ST]		03/11/2022	P	\$1,001 - \$15,000	
Fidelity Traditional IRA ⇒ Walmart Inc. (WMT) [ST]		09/13/2022	P	\$15,001 - \$50,000	

\* Asset class 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

None disclosed.

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 as part of BRP Group Inc.'s asset purchase of Lanier Upshaw, Inc. on 1/1/2020. A portion of the purchase price consisted of 389,727 shares of BRP Group's Class A Common Stock (NASDAQ: BRP) at \$15.70 per share, for a value of \$4,902,021.90. The Rollover Equity Lock-Up Agreement specifies the terms under which these shares can be sold, pledged, transferred, etc.
January 2020	Baldwin Krystyn Sherman Partners, LLC, Scott Franklin, William Dorman, Kathryn Koch and Bruce Bulman	Agreement provides the terms of an "Earn Out" calculation that is part of BRP Group, Inc.'s asset purchase of Lanier Upshaw, Inc. The agreement calls for a calculation and potential payments to be made to the former Lanier Upshaw, Inc. shareholders (Franklin, Dorman, Koch and Bulman) following the 12 month and 36 month anniversaries of the asset sale of Lanier Upshaw, Inc. to BRP Group, Inc.

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?
American Israel Education Foundation	02/18/2022	02/26/2022	Washington, DC - Jerusalem, Israel - 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 ASSET CLASS DETAILS

<ul style="list-style-type: none"><li>BRP Colleague, Inc. 401(k)</li><li>Fidelity Joint TBE (Owner: JT) LOCATION: US</li><li>Fidelity Roth IRA</li><li>Fidelity Roth IRA (Owner: SP)</li><li>Fidelity Traditional IRA</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 Mr Franklin , 07/29/2023