



Filing ID #10063183

# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

**Name:** Dr. Joel Rudman  
**Status:** Congressional Candidate  
**State/District:** FL01

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2024  
**Filing Date:** 12/19/2024  
**Period Covered:** 01/01/2023– 09/6/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Holy Navarre Medical Clinic Simple IRA ⇒ Simple IRA [OT] DESCRIPTION: SIMPLE IRA		\$250,001 - \$500,000	Tax-Deferred		
MassMutual [WU]		\$100,001 - \$250,000	None		
MassMutual [WU]	SP	\$50,001 - \$100,000	None		
Schwab ⇒ Schwab Managed Account [OT] DESCRIPTION: SMA		\$500,001 - \$1,000,000	Capital Gains, Dividends, Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
Schwab IRA [OT] DESCRIPTION: Spouse Roth IRA - SMA	SP	\$1,001 - \$15,000	Tax-Deferred		
Schwab IRA ⇒ Schwab IRA [OT] DESCRIPTION: Rollover IRA		\$100,001 - \$250,000	Tax-Deferred		
Schwab IRA ⇒		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Schwab IRA [OT]					
DESCRIPTION: Roth IRA - SMA					
Simple IRA [OT]	SP	\$250,001 - \$500,000	Tax-Deferred		
DESCRIPTION: Spouse SEP IRA					

\* 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
Holley Navarre Medical Clinic	Doctor salary	\$90,000.00	\$69,000.00
State of Florida	Representative salary	\$29,697.00	\$29,697.00
Holley Navarre Medical Clinic	Owner (ordinary business income)	N/A	\$93,732.00

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	REGIONS BANK	2005	Office note on medical practice	\$50,001 - \$100,000

### SCHEDULE E: POSITIONS

None disclosed.

### SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
HOLLEY NAVARRE MEDICAL CLINIC (Navarre, FL, US)	Dr for my solo practice
State of Florida (Tallahassee, FL, US)	Member of the Florida House

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Holy Navarre Medical Clinic Simple IRA  
DESCRIPTION: Retirement Plan
- Schwab
- Schwab IRA

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:** Dr. Joel Rudman , 12/19/2024