



Filing ID #10050096

FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 Cannon Building • Washington, DC 20515

FILER INFORMATION

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

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2021
Filing Date: 08/9/2022

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan ⇒ AF Europac Growth R6 [MF]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan ⇒ FID 500 Index [MF]	SP	\$15,001 - \$50,000	None	<input type="checkbox"/>
Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan ⇒ FID Freedom 2040 K [MF]	SP	\$15,001 - \$50,000	None	<input type="checkbox"/>
Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan ⇒ FID SM Cap Idx Large Cap [MF]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan ⇒ I O Develop Mkt R6 Small Cap [MF]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Florida Retirement System (ED) ⇒ FRS 2045 Retirement Fund (2045) [DB]	SP	\$15,001 - \$50,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒		\$1,001 - \$15,000	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Bristol-Myers Squibb Company (BMY) [ST]				
Moran Wealth IRA ⇒ Brunswick Corporation (BC) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Brunswick Corporation (BC) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Cadence Design Systems, Inc. (CDNS) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Cadence Design Systems, Inc. (CDNS) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Carlisle Companies Incorporated (CSL) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Carlisle Companies Incorporated (CSL) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Cash [IH]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Cash [IH]	SP	\$1 - \$1,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Celanese Corporation Celanese Corporation (CE) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Chemed Corp (CHE) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Chemed Corp (CHE) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Edwards Lifesciences Corporation (EW) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Edwards Lifesciences Corporation (EW) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Expeditors International of Washington, Inc. (EXPD) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx.	> \$1,000?
Moran Wealth IRA ⇒ Expeditors International of Washington, Inc. (EXPD) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Faurecia SA Ordinary Shares (FURCF) [ST]		\$1 - \$1,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Fortinet, Inc. (FTNT) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Fortinet, Inc. (FTNT) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ General Motors Company (GM) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Ingersoll Rand Inc. (IR) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Intuit Inc. (INTU) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Intuit Inc. (INTU) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Intuitive Surgical, Inc. (ISRG) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Intuitive Surgical, Inc. (ISRG) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Lockheed Martin Corporation (LMT) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Lockheed Martin Corporation (LMT) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Mastercard Incorporated (MA) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Mastercard Incorporated (MA) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Molina Healthcare Inc (MOH) [ST]		\$1,001 - \$15,000	None		<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	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Monster Beverage Corporation (MNST) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Monster Beverage Corporation (MNST) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Parker-Hannifin Corporation (PH) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Parker-Hannifin Corporation (PH) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ PerkinElmer, Inc. (PKI) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ PerkinElmer, Inc. (PKI) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Regeneron Pharmaceuticals, Inc. (REGN) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Regeneron Pharmaceuticals, Inc. (REGN) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Robert Half International Inc. (RHI) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Robert Half International Inc. (RHI) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Shopify Inc. Class A Subordinate Voting Shares (SHOP) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Shopify Inc. Class A Subordinate Voting Shares (SHOP) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Sony Group Corporation American Depository Shares (SONY) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Moran Wealth IRA ⇒ Sony Group Corporation American Depository Shares (SONY) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Stellantis N.V. Common Shares (STLA) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Stellantis N.V. Common Shares (STLA) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Take-Two Interactive Software, Inc. (TTWO) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Take-Two Interactive Software, Inc. (TTWO) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Trane Technologies plc (TT) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Trane Technologies plc (TT) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Veeva Systems Inc. Class A (VEEV) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Veeva Systems Inc. Class A (VEEV) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Verizon Communications Inc. (VZ) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Verizon Communications Inc. (VZ) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Washington Federal, Inc. (WAFD) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Washington Federal, Inc. (WAFD) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Zebra Technologies Corporation - Class A (ZBRA) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income Tx. > \$1,000?
Zebra Technologies Corporation - Class A (ZBRA) [ST]				<input type="checkbox"/>
Moran Wealth IRA ⇒ Zions Bancorporation N.A. (ZION) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Zions Bancorporation N.A. (ZION) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Zoetis Inc. Class A (ZTS) [ST]		\$1,001 - \$15,000	None	<input type="checkbox"/>
Moran Wealth IRA ⇒ Zoetis Inc. Class A (ZTS) [ST]	SP	\$1,001 - \$15,000	None	<input type="checkbox"/>
Optima Ed, LLC, 81% Interest [OL]	SP	\$100,001 - \$250,000	None	<input type="checkbox"/>
LOCATION: Naples, FL, US DESCRIPTION: Education Services Company				

* 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

None disclosed.

SCHEDULE C: EARNED INCOME

Source	Type	Amount
Educator Solutions	Spouse Salary	\$174,159.62
US House of Representatives	Salary	\$149,369.58

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Nelnet	2002	Student Loan	\$10,000 - \$15,000
	Chase Bank	December 2019	Credit Card	\$15,001 - \$50,000
SP	Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan	August 2012	401K Loan	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Representative	US House of Representatives
Representative	Collier County Republican Executive Committee

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 ASSET CLASS DETAILS

- Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan (Owner: SP)
- Florida Retirement System (ED) (Owner: SP)
- Moran Wealth IRA
- Moran Wealth IRA (Owner: SP)

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 , 08/9/2022