



Filing ID #10033537

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Byron Donalds
Status: Congressional Candidate
State/District: FL19

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 07/13/2020
Period Covered: 01/01/2019– 06/30/2020

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan ⇒ AF Europac Growth R6 [MF]	SP	\$1,001 - \$15,000	None		
Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan ⇒ FID 500 Index [MF]	SP	\$1,001 - \$15,000	None		
Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan ⇒ FID Freedom 2040 K [MF]	SP	\$15,001 - \$50,000	None		
Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan ⇒ FID SM Cap Idx Large Cap [MF]	SP	\$1,001 - \$15,000	None		
Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan ⇒ I O Develop Mkt R6 Small Cap [MF]	SP	\$1,001 - \$15,000	None		
DGHM Profit Sharing Plan 401K ⇒	SP	\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DGHM AllCap Value 401k [OT]					
DESCRIPTION: 401K commingled fund					
DGHM Profit Sharing Plan 401K ⇒ DGHM SmallCap Value 401K [OT]	SP	\$15,001 - \$50,000	None		
DESCRIPTION: 401K commingled fund					
DGHM Profit Sharing Plan 401K ⇒ DGHM UltraValue 401K [OT]	SP	\$1,001 - \$15,000	None		
DESCRIPTION: 401K commingled fund					
Florida Retirement System (BD) ⇒ Large Cap Stock Fund [DB]		\$1,001 - \$15,000	None		
Florida Retirement System (BD) ⇒ Small Mid Cap Stock Fund [DB]		\$1,001 - \$15,000	None		
Florida Retirement System (ED) ⇒ FRS 2045 Retirement Fund (2045) [DB]	SP	\$15,001 - \$50,000	None		
Moran Wealth 401K ⇒ State Street Equity 500 Index Fund K [MF]		\$1,001 - \$15,000	None		
Moran Wealth 401K ⇒ Vanguard Small Cap Index Fund Admiral [MF]		\$1,001 - \$15,000	None		
Moran Wealth 401K ⇒ VanguardStrategic Equity Investor [MF]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Alibaba Group Holding Limited American Depositary Shares each representing eight Ordinary share (BABA) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ AMETEK, Inc. (AME) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Anthem, Inc. (ANTM) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Biogen Inc. (BIIB) [ST]					
Moran Wealth IRA ⇒ Bristol-Myers Squibb Company (BMY) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Carlisle Companies Incorporated (CSL) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Chemed Corp (CHE) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Ciena Corporation (CIEN) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Fortinet, Inc. (FTNT) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ General Motors Company (GM) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Honeywell International Inc. (HON) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Ingersoll Rand Inc. (IR) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Intuit Inc. (INTU) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ L3Harris Technologies, Inc. (LHX) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Mastercard Incorporated (MA) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Molina Healthcare Inc (MOH) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Parker-Hannifin Corporation (PH) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Republic Services, Inc. (RSG) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Moran Wealth IRA ⇒ Tech Data Corporation (TECD) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ T-Mobile US, Inc. (TMUS) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ United Technologies Corporation (UTX) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Verizon Communications Inc. (VZ) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Walgreens Boots Alliance, Inc. (WBA) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Washington Federal, Inc. (WAFD) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Waste Management, Inc. (WM) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Zebra Technologies Corporation - Class A (ZBRA) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Zoetis Inc. Class A (ZTS) [ST]		\$1,001 - \$15,000	None		

* 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

Source	Type	Amount Current Year to Filing	Amount Preceding Year
State of Florida	Salary	\$26,389.80	\$26,624.76
Moran Edwards Asset Management LLC	Salary	N/A	\$7,916.66
Wells Fargo Clearing Services	Salary	N/A	\$66,824.76

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Moran Wealth Management, LLC	Partnership Income	\$82,465.00	N/A
Moran Wealth Management, LLC	Salary	\$89,537.65	N/A
Educator Solutions	Spouse Salary	N/A	N/A
Onesto LLC	Spouse Partnership Income	N/A	N/A
Boston Private Financial Holdings, Inc.	Spouse Partnership Income	N/A	N/A
Dalton, Greiner, Hartman, Maher & Co., LLC	Spouse Salary and Partnership Income	N/A	N/A
Vestcor Family Foundation, Inc.	Spouse 1099 Income	N/A	N/A
School District of Collier County Florida	Spouse Salary	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Nelnet	2002	Student Loan	\$10,000 - \$15,000
SP	Nelnet	2002	Student Loan	\$15,001 - \$50,000
	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	\$10,000 - \$15,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Partner	Moran Wealth Management, LLC
Employee	Moran Wealth Management, LLC
State of Florida	Representative
Employee	Moran Edwards Asset Management LLC
Employee	Wells Fargo Advisors
Member	Collier County Republican Executive Committee

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
Certain confidential clients are not reported (Naples, FL, US)	Financial Advisor Services
COMMENTS: Certain confidential clients are not reported due to the confidentiality agreement entered into with the client at the time that financial advisor services were retained.	

SCHEDULE A ASSET CLASS DETAILS

- Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan (Owner: SP)
- DGHM Profit Sharing Plan 401K (Owner: SP)
- Florida Retirement System (BD)
- Florida Retirement System (ED) (Owner: SP)
- Moran Wealth 401K
- Moran Wealth 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: Byron Donalds , 07/13/2020