



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Mr. Scott Franklin
Status: Congressional Candidate
State/District: FL15

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2020
Filing Date: 07/14/2020
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
Bank of Central Florida Checking Accounts [BA]	JT	\$500,001 - \$1,000,000	Interest	\$201 - \$1,000	\$1 - \$200
BRP Colleague, Inc. 401(k) ⇒ Vanguard 500 Index Fund [MF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Employer 401(k) Plan. 100% invested in VFIAX (Large Blend)					
BRP Group, Inc. - Class A (BRP) [ST]		\$5,000,001 - \$25,000,000	None		
City of Lakeland FICA Alternative Plan ⇒ Putnam Stable Value .25% [MF]		\$1,001 - \$15,000	Tax-Deferred		
DESCRIPTION: City of Lakeland Employee Retirement Account managed by TIAA					
Fidelity IRA-Spousal ⇒ FDIC Bank Deposit Sweep [BA]	SP	\$1 - \$1,000	Tax-Deferred		
DESCRIPTION: QIWSQ FDIX Bank Deposit Sweep money market program					
Fidelity Joint TBE ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	JT	\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Joint TBE ⇒ American Electric Power Company, Inc. (AEP) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒ Apple Inc. (AAPL) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	Not Applicable
Fidelity Joint TBE ⇒ AT&T Inc. (T) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒ Bangor Savings Bk Me 1.6% 04-28-2020 [BA]	JT	None	Interest	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒ Bank Leumi USA New York NY 1.6% 07-13-2020 [BA]	JT	\$500,001 - \$1,000,000	Interest	\$2,501 - \$5,000	Not Applicable
Fidelity Joint TBE ⇒ Bank West San Francisco Calif 1.6% 07-15-2020 [BA]	JT	\$500,001 - \$1,000,000	Interest	\$2,501 - \$5,000	Not Applicable
Fidelity Joint TBE ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	JT	\$15,001 - \$50,000	None		
Fidelity Joint TBE ⇒ Centerstate Bank FL 1.6% 07-15-2020 [BA]	JT	\$250,001 - \$500,000	Interest	\$1,001 - \$2,500	Not Applicable
Fidelity Joint TBE ⇒ Cisco Systems, Inc. (CSCO) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒ FDIC Bank Deposit Sweep [BA]	JT	\$1,000,001 - \$5,000,000	Interest	\$1,001 - \$2,500	Not Applicable
Fidelity Joint TBE ⇒ Fidelity Advisor International Capital Appreciation [MF]	JT	\$15,001 - \$50,000	Dividends	None	Not Applicable
Fidelity Joint TBE ⇒ Fidelity Advisor Total Bond [MF]	JT	None	Interest	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒ Fidelity Mid Cap Stock [MF]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒	JT	None	Interest	\$1,001 - \$2,500	Not

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fvcbankcorp 1.6% 04-17-2020 [BA]					Applicable
Fidelity Joint TBE ⇒ Home Depot, Inc. (HD) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒ Invesco BulletShares 2024 Corporate Bond ETF [EF]	JT	None	Capital Gains, Interest	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒ Invesco BulletShares 2025 Corporate Bond ETF [EF]	JT	\$100,001 - \$250,000	Capital Gains, Interest	\$1,001 - \$2,500	Not Applicable
Fidelity Joint TBE ⇒ Invesco QQQ Trust [EF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	Not Applicable
DESCRIPTION: QQQ					
Fidelity Joint TBE ⇒ iShares Core S&P Small-Cap ETF [EF]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	Not Applicable
Fidelity Joint TBE ⇒ Johnson & Johnson (JNJ) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒ JP Morgan Chase & Co. (JPM) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒ McDonald's Corporation (MCD) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	Not Applicable
Fidelity Joint TBE ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	Not Applicable
Fidelity Joint TBE ⇒ Merchants Bank Ind Lynn 1.65% 04-27-2020 [BA]	JT	None	Interest	\$1,001 - \$2,500	Not Applicable
Fidelity Joint TBE ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒ Metabank Sioux Falls SD 1.55% Due 02-26-2020 [BA]	JT	None	Interest	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒	JT	\$15,001 - \$50,000	Dividends	\$1 - \$200	Not

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Microsoft Corporation (MSFT) [ST]					Applicable
Fidelity Joint TBE ⇒ Pepsico, Inc. (PEP) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒ Pfizer, Inc. (PFE) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒ Pinnacle Bk Nashville Tenn 1.65% 10-21-2020 [BA]	JT	\$500,001 - \$1,000,000	Interest	\$2,501 - \$5,000	Not Applicable
Fidelity Joint TBE ⇒ Procter & Gamble Company (PG) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒ Southeast Bank Athens Tenn. 1.55% 03-23-2020 [BA]	JT	None	Interest	\$1,001 - \$2,500	Not Applicable
Fidelity Joint TBE ⇒ Southside Bk Tyler Texas 1.65% 10-23-2020 [BA]	JT	\$250,001 - \$500,000	Interest	\$1,001 - \$2,500	Not Applicable
Fidelity Joint TBE ⇒ United Parcel Service, Inc. (UPS) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒ United States Treasury Notes 1.375% 03-31-2020 [BA]	JT	None	Capital Gains, Interest	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒ Verizon Communications Inc. (VZ) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒ Walmart Inc. (WMT) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	Not Applicable
Fidelity Joint TBE ⇒ Walt Disney Company (DIS) [ST]	JT	\$15,001 - \$50,000	None		
Fidelity Joint TBE ⇒ Wells Fargo Natl Bk West Las Vegas 1.7% 10-19-2020 [BA]	JT	\$500,001 - \$1,000,000	Interest	\$2,501 - \$5,000	Not Applicable
Fidelity Roth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Roth IRA ⇒ American Electric Power Company, Inc. (AEP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Apple Inc. (AAPL) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$1,001 - \$15,000	None		
Fidelity Roth IRA ⇒ Cisco Systems, Inc. (CSCO) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Discover Financial Services (DFS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ FDIC Bank Deposit Sweep [BA] DESCRIPTION: QIWSQ FDIC Bank Deposit Sweep money market program		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ FDIC Bank Deposit Sweep [BA] DESCRIPTION: QIWSQ FDIC Bank Deposit Sweep money market program	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity Advisor International Capital Appreciation [MF] DESCRIPTION: FIDZX	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity Advisor International Capital Appreciation [MF] DESCRIPTION: FIDZX		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity Advisor Total Bond Fund [MF] DESCRIPTION: FBKWX		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity Advisor Total Bond Fund [MF] DESCRIPTION: FBKWX	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Roth IRA ⇒ Fidelity Contrafund [MF] DESCRIPTION: FCNTX	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity Mid Cap Stock [MF] DESCRIPTION: FMCSX	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity Mid Cap Stock [MF] DESCRIPTION: FMCSX		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity MSCI Consumer Staples Index ETF [EF] DESCRIPTION: FSTA	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity MSCI Financials Index ETF [EF] DESCRIPTION: FNCL	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity MSCI Healthcare Index ETF [EF] DESCRIPTION: FHLC	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Fidelity NASDAQ Composite Index Tracking Stock Fund [EF] DESCRIPTION: ONEQ	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Home Depot, Inc. (HD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Invesco QQQ Trust [EF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ iShares 0-5 Year High Yield Corporate Bond ETF [EF] DESCRIPTION: SHYG		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ iShares 0-5 Year High Yield Corporate Bond ETF [EF] DESCRIPTION: SHYG	SP	\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Roth IRA ⇒ iShares Core 1-5 Year USD Bond ETF [EF] DESCRIPTION: ISTB		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ iShares Core S&P 500 ETF [EF] DESCRIPTION: IVV	SP	\$15,001 - \$50,000	Tax-Deferred		
Fidelity Roth IRA ⇒ iShares Core S&P Small-Cap ETF [EF] DESCRIPTION: IJR	SP	\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ iShares Core S&P Small-Cap ETF [EF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Johnson & Johnson (JNJ) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ McDonald's Corporation (MCD) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Microsoft Corporation (MSFT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ NextEra Energy, Inc. (NEE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Pepsico, Inc. (PEP) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Pfizer, Inc. (PFE) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ PNC Financial Services Group, Inc. (PNC) [ST]		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Roth IRA ⇒ Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Starbucks Corporation (SBUX) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ United Parcel Service, Inc. (UPS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Verizon Communications Inc. (VZ) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Visa Inc. (V) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Walmart Inc. (WMT) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Roth IRA ⇒ Walt Disney Company (DIS) [ST]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$15,001 - \$50,000	None		
Fidelity Traditional IRA ⇒ American Electric Power Company, Inc. (AEP) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ Apple Inc. (AAPL) [ST]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ AT&T Inc. (T) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]		\$15,001 - \$50,000	None		
Fidelity Traditional IRA ⇒ Cisco Systems, Inc. (CSCO) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ Discover Financial Services (DFS) [ST]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Traditional IRA ⇒ FDIC Bank Deposit Sweep [BA]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Ticker: QIWSQ Bank Deposit Sweep money market program					
Fidelity Traditional IRA ⇒ Fidelity Advisor International Capital Appreciation [MF]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Ticker: FIDZX					
Fidelity Traditional IRA ⇒ Fidelity Advisor Total Bond Fund [MF]		\$100,001 - \$250,000	Tax-Deferred		
DESCRIPTION: Ticker: FBKWX					
Fidelity Traditional IRA ⇒ Fidelity Mid Cap Stock [MF]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Ticker: FMCSX					
Fidelity Traditional IRA ⇒ Home Depot, Inc. (HD) [ST]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ Invesco BulletShares 2021 High Yield Corporate Bond ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Ticker: BSJL					
Fidelity Traditional IRA ⇒ Invesco BulletShares 2022 High Yield Corporate Bond ETF [EF]		\$15,001 - \$50,000	Tax-Deferred		
DESCRIPTION: Ticker: BSJM					
Fidelity Traditional IRA ⇒ Invesco QQQ Trust [EF]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Ticker: QQQ					
Fidelity Traditional IRA ⇒ iShares 0-5 Year High Yield Corporate Bond ETF [EF]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Ticker: SHYG					
Fidelity Traditional IRA ⇒ iShares Core S&P Small-Cap ETF [EF]		\$50,001 - \$100,000	Tax-Deferred		
DESCRIPTION: Ticker: IJR					
Fidelity Traditional IRA ⇒ Johnson & Johnson (JNJ) [ST]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Traditional IRA ⇒ JP Morgan Chase & Co. (JPM) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ McDonald's Corporation (MCD) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ Microsoft Corporation (MSFT) [ST]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ NextEra Energy, Inc. (NEE) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ Pepsico, Inc. (PEP) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ Pfizer, Inc. (PFE) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ PNC Financial Services Group, Inc. (PNC) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ Procter & Gamble Company (PG) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ Starbucks Corporation (SBUX) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ United Parcel Service, Inc. (UPS) [ST]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ Verizon Communications Inc. (VZ) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Traditional IRA ⇒ Visa Inc. (V) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Traditional IRA ⇒		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Walmart Inc. (WMT) [ST]					
Fidelity Traditional IRA ⇒ Walt Disney Company (DIS) [ST]		\$15,001 - \$50,000	Tax-Deferred		
OK3 Capital Holdings, LLC [RP]		\$100,001 - \$250,000	Aircraft Dry Lease	\$201 - \$1,000	\$1,001 - \$2,500
LOCATION: Lakeland/Polk, FL, US DESCRIPTION: Asset in LLC is 50% ownership of a 2011 Cirrus SR-22 aircraft. Income is derived from a dry lease with the pilot, C. Scott Franklin (myself).					
OK3 Properties, LLC [RP]		\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	None
LOCATION: Lakeland/Polk, FL, US DESCRIPTION: Assets in LLC are commercial office buildings at 1115 and 1129 Bartow Rd., Lakeland, FL 33801					
Pacific Life VUL [WU]	SP	\$15,001 - \$50,000	Tax-Deferred		
PruLife Custom Premier Life Ins. Policy [WU]		\$50,001 - \$100,000	Tax-Deferred		

* 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
BRP Colleague, Inc.	Salary	\$177,188.50	N/A
City of Lakeland Employees	Salary	\$15,766.56	\$31,533.12
Lanier Upshaw, Inc.	Income	N/A	\$632,898.00
Etcetera, Inc.	Spouse salary	\$8,000.00	\$18,949.00
Lanier Upshaw, Inc.	Shareholder Distribution	N/A	\$470,853.00
OK3 Properties, LLC	Rental Income on commercial property	\$207,204.48	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	James C. Franklin, Jr.	January 2020	Note on commercial office buildings owned by OK3 Properties, LLC	\$1,000,001 - \$5,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Managing Partner	Baldwin Krystyn Sherman Partners, LLC
Director	Lanier Upshaw, Inc.
Chief Executive Officer	Lanier Upshaw, Inc.
Director	Sun 'n Fun Fly-In, Inc.
City Commissioner and Mayor Pro Tem	City of Lakeland, Florida
Director	Lakeland Downtown Development Authority
Member, Board of Overseers	Barney Barnett School of Business & Free Enterprise at Florida Southern College
Representative	Polk Transportation Planning Organization
Director	Lakeland Country Club
Representative	Lakeland Airport Advisory Board
Director	Aerospace Center for Excellence
Managing Member	OK3 Capital Holdings, LLC
Managing Member	OK3 Properties, LLC

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2020	BRP Group, Inc., Baldwin Krystyn Sherman Partners, LLC, 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 at \$15.70 per share. Of those shares, 312,231 were allocated to Clifford Scott Franklin 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. Agreement allows for 25% to be "unlocked" fo
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

Date	Parties To	Terms of Agreement
		and 36 month anniversaries of the asset sale of Lanier Upshaw, Inc. to BRP Partners, Inc.

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

Source (Name and Address)	Brief Description of Duties
Harrell's, LLC (Lakeland, FL, US)	Risk Management
Harrod Properties (Tampa, FL, US)	Risk Management
Bernie Little Distributors, Inc. (Eaton Park, FL, US)	Risk Management
Southeastern Printing (Stuart, FL, US)	Risk Management
Medicomp, Inc. (Melbourne , FL, US)	Risk Management
Bank of Central Florida (Lakeland, FL, US)	Risk Management
Florida Turbine Technologies (Jupiter, FL, US)	Risk Management
Clark Campbell Lancaster & Munson, P.A. (Lakeland, FL, US)	Risk Management
Boring Business Systems (Lakeland, FL, US)	Risk Management
Rodda Construction (Lakeland, FL, US)	Risk Management
Semco Construction (Bartow, FL, US)	Risk Management
Miller Construction (Lakeland, FL, US)	Risk Management
Beckryger Capital Partners (Lakeland, FL, US)	Risk Management
Payne Air Conditioning & Heating (Lakeland, FL, US)	Risk Management
Lakeland Country Club (Lakeland, FL, US)	Risk Management
McCraney Property Company (West Palm Beach, FL, US)	Risk Management
Advanced Overhead Systems, Inc. (Lakeland, FL, US)	Risk Management
Cement Products & Supply Co., Inc. (Lakeland, FL, US)	Risk Management
Gulf Coast Avionics (Lakeland, FL, US)	Risk Management
Smithbilt Industries, Inc. (Lakeland, FL, US)	Risk Management
Oliver Hale & Company, Inc. (St. Cloud, FL, US)	Risk Management

Source (Name and Address)	Brief Description of Duties
Manatee Players, Inc. (Bradenton, FL, US)	Risk Management
KolorTrax Unlimited (Mulberry, FL, US)	Risk Management
Lone Palm Golf Club (Lakeland, FL, US)	Risk Management

SCHEDULE A ASSET CLASS DETAILS

<ul style="list-style-type: none"> o BRP Colleague, Inc. 401(k) o City of Lakeland FICA Alternative Plan o Fidelity IRA-Spousal (Owner: SP) o Fidelity Joint TBE (Owner: JT) LOCATION: US o Fidelity Roth IRA o Fidelity Roth IRA (Owner: SP) o Fidelity Traditional 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: Mr. Scott Franklin , 07/14/2020