



FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Hon. Scott Franklin
Status: Member
State/District: FL15

FILING INFORMATION

Filing Type: New Filer Report
Filing Year: 2020
Filing Date: 08/13/2021

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 | \$100,001 - \$250,000 | Interest | Not Applicable | \$201 - \$1,000 |
| 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 | | |
| Fidelity IRA-Spousal ⇒ FDIC Bank Deposit Sweep [BA] | SP | \$1 - \$1,000 | Tax-Deferred | | |
| DESCRIPTION: QIWSQ FDIC Bank Deposit Sweep money market program | | | | | |
| Fidelity Joint TBE ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST] | JT | \$15,001 - \$50,000 | None | | |
| Fidelity Joint TBE ⇒ American Electric Power Company, Inc. (AEP) [ST] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$201 - \$1,000 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|--------------|---------------------------|-----------------------|--------------------------------------|------------------------------|
| Fidelity Joint TBE ⇒ Apple Inc. (AAPL) [ST] | JT | \$50,001 - \$100,000 | Dividends | Not Applicable | \$201 - \$1,000 |
| Fidelity Joint TBE ⇒ AT&T Inc. (T) [ST] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$1,001 - \$2,500 |
| Fidelity Joint TBE ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST] | JT | \$15,001 - \$50,000 | None | | |
| Fidelity Joint TBE ⇒ Cisco Systems, Inc. (CSCO) [ST] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$201 - \$1,000 |
| Fidelity Joint TBE ⇒ FDIC Bank Deposit Sweep [BA] | JT | \$1,000,001 - \$5,000,000 | Interest | Not Applicable | \$1,001 - \$2,500 |
| Fidelity Joint TBE ⇒ Fidelity Advisor International Capital Appreciation [MF] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$1 - \$200 |
| Fidelity Joint TBE ⇒ Fidelity Mid Cap Stock [MF] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$1,001 - \$2,500 |
| Fidelity Joint TBE ⇒ Home Depot, Inc. (HD) [ST] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$201 - \$1,000 |
| Fidelity Joint TBE ⇒ Invesco BulletShares 2025 Corporate Bond ETF (BSCP) [ST] | JT | \$100,001 - \$250,000 | Interest | Not Applicable | \$2,501 - \$5,000 |
| Fidelity Joint TBE ⇒ Invesco QQQ Trust [EF] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$201 - \$1,000 |
| Fidelity Joint TBE ⇒ iShares Core S&P Small-Cap ETF [EF] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$201 - \$1,000 |
| Fidelity Joint TBE ⇒ Johnson & Johnson (JNJ) [ST] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$201 - \$1,000 |
| Fidelity Joint TBE ⇒ JP Morgan Chase & Co. (JPM) [ST] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$201 - \$1,000 |
| Fidelity Joint TBE ⇒ McDonald's Corporation (MCD) [ST] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$201 - \$1,000 |
| Fidelity Joint TBE ⇒ | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$201 - \$1,000 |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Medtronic plc. Ordinary Shares (MDT) [ST] | | | | | |
| Fidelity Joint TBE ⇒ Merck & Company, Inc. Common Stock (MRK) [ST] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$201 - \$1,000 |
| Fidelity Joint TBE ⇒ Microsoft Corporation (MSFT) [ST] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$201 - \$1,000 |
| Fidelity Joint TBE ⇒ NextEra Energy, Inc. (NEE) [ST] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$201 - \$1,000 |
| Fidelity Joint TBE ⇒ Pepsico, Inc. (PEP) [ST] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$201 - \$1,000 |
| Fidelity Joint TBE ⇒ Pfizer, Inc. (PFE) [ST] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$1,001 - \$2,500 |
| Fidelity Joint TBE ⇒ Procter & Gamble Company (PG) [ST] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$201 - \$1,000 |
| Fidelity Joint TBE ⇒ United Parcel Service, Inc. (UPS) [ST] | JT | \$50,001 - \$100,000 | Dividends | Not Applicable | \$201 - \$1,000 |
| Fidelity Joint TBE ⇒ Verizon Communications Inc. (VZ) [ST] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$1,001 - \$2,500 |
| Fidelity Joint TBE ⇒ Viatris Inc. (VTRS) [ST] | JT | \$1,001 - \$15,000 | None | | |
| Fidelity Joint TBE ⇒ Walmart Inc. (WMT) [ST] | JT | \$15,001 - \$50,000 | Dividends | Not Applicable | \$201 - \$1,000 |
| Fidelity Roth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST] | | \$1,001 - \$15,000 | None | | |
| 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 ⇒ | | \$1,001 - \$15,000 | Tax-Deferred | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| AT&T Inc. (T) [ST] | | | | | |
| 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] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: QIWSQ FDIC Bank Deposit Sweep money market program | | | | | |
| Fidelity Roth IRA ⇒ FDIC Bank Deposit Sweep [BA] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: QIWSQ FDIC Bank Deposit Sweep money market program | | | | | |
| Fidelity Roth IRA ⇒ Fidelity Advisor International Capital Appreciation [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| DESCRIPTION: FIDZX | | | | | |
| Fidelity Roth IRA ⇒ Fidelity Advisor International Capital Appreciation [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: FIDZX | | | | | |
| Fidelity Roth IRA ⇒ Fidelity Advisor Total Bond Fund [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: FBKWX | | | | | |
| Fidelity Roth IRA ⇒ Fidelity Advisor Total Bond Fund [MF] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| DESCRIPTION: FBKWX | | | | | |
| Fidelity Roth IRA ⇒ Fidelity Contrafund [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: FCNTX | | | | | |
| Fidelity Roth IRA ⇒ Fidelity Mid Cap Stock [MF] | SP | \$1,001 - \$15,000 | Tax-Deferred | | |
| DESCRIPTION: FMCSX | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| Fidelity Roth IRA ⇒ Fidelity Mid Cap Stock [MF] DESCRIPTION: FMCSX | | \$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 ⇒ Fidelity Quality Factor ETF (FQAL) [ST] | 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 | | |
| Fidelity Roth IRA ⇒ iShares Core Dividend Growth ETF (DGRO) [ST] | SP | \$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 | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|--|--------------|-----------------------|-----------------------|--------------------------------------|------------------------------|
| 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 | | |
| 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 ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST] | | \$1,001 - \$15,000 | Tax-Deferred | | |
| Fidelity Roth IRA ⇒ Verizon Communications Inc. (VZ) [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 ⇒ Viatis Inc. (VTRS) [ST] | | \$1 - \$1,000 | 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 Traditional IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST] | | \$50,001 - \$100,000 | 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] | | \$50,001 - \$100,000 | None | | |
| Fidelity Traditional IRA ⇒ Cisco Systems, Inc. (CSCO) [ST] | | \$50,001 - \$100,000 | Tax-Deferred | | |
| Fidelity Traditional IRA ⇒ Discover Financial Services (DFS) [ST] | | \$50,001 - \$100,000 | Tax-Deferred | | |
| 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 | | | | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|-------------------------|----------------|-------------------------------|-----------------------|
| 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 (BSJL) [ST] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Fidelity Traditional IRA ⇒ Invesco BulletShares 2022 High Yield Corporate Bond ETF (BSJM) [ST] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Fidelity Traditional IRA ⇒ Invesco QQQ Trust [EF] | | \$50,001 - \$100,000 | Tax-Deferred | | |
| 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 | | |
| Fidelity Traditional IRA ⇒ JP Morgan Chase & Co. (JPM) [ST] | | \$50,001 - \$100,000 | 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 | | |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|--------------|--------------------------|-----------------------|--------------------------------------|------------------------------|
| Fidelity Traditional IRA ⇒ NextEra Energy, Inc. (NEE) [ST] | | \$50,001 - \$100,000 | 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] | | \$50,001 - \$100,000 | Tax-Deferred | | |
| Fidelity Traditional IRA ⇒ Procter & Gamble Company (PG) [ST] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Fidelity Traditional IRA ⇒ Starbucks Corporation (SBUX) [ST] | | \$50,001 - \$100,000 | Tax-Deferred | | |
| Fidelity Traditional IRA ⇒ United Parcel Service, Inc. (UPS) [ST] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Fidelity Traditional IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Fidelity Traditional IRA ⇒ Verizon Communications Inc. (VZ) [ST] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| Fidelity Traditional IRA ⇒ Viatris Inc. (VTRS) [ST] | | \$1,001 - \$15,000 | None | | |
| Fidelity Traditional IRA ⇒ Visa Inc. (V) [ST] | | \$50,001 - \$100,000 | Tax-Deferred | | |
| Fidelity Traditional IRA ⇒ Walmart Inc. (WMT) [ST] | | \$15,001 - \$50,000 | Tax-Deferred | | |
| OK3 Capital Holdings, LLC [RP] | | \$100,001 - \$250,000 | Aircraft Dry Lease | Not Applicable | \$201 - \$1,000 |
| <p>LOCATION: Lakeland/Polk, FL, US</p> <p>DESCRIPTION: Asset in LLC was 50% ownership of a 2011 Cirrus SR-22 aircraft, sold on XXXXX. Income was derived from a dry lease with the pilot, C. Scott Franklin (myself).</p> | | | | | |
| OK3 Properties, LLC [RP] | | \$1,000,001 - | Rent | Not Applicable | \$100,001 - |

| Asset | Owner | Value of Asset | Income Type(s) | Income Current Year to Filing | Income Preceding Year |
|---|-------|---------------------------|----------------|-------------------------------|-------------------------|
| | | \$5,000,000 | | | \$1,000,000 |
| 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 | Not Applicable | \$100,001 - \$1,000,000 |
| LOCATION: Lakeland/Polk, FL, US DESCRIPTION: Asset is a commercial office building at 1129 Bartow Rd., Lakeland, FL 33801 | | | | | |
| Pacific Life VUL Policy [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 | N/A | \$362,000.00 |
| City of Lakeland Employees | Salary | N/A | \$31,533.12 |
| Etcetera, Inc. | Spouse Salary | N/A | \$18,949.00 |
| OK3 Properties, LLC | Rental Income on commercial property | N/A | \$438,048.00 |

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 |
| Chief Executive Officer | Lanier Upshaw, Inc. |

| Position | Name of Organization |
|-------------------------------------|---|
| Director | Lanier Upshaw, Inc. |
| City Commissioner and Mayor Pro Tem | City of Lakeland, Florida |
| Director | Sun 'n Fun Fly-In, Inc. |
| 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 |
| Representative | Lakeland Linder International Airport Advisory Board |
| Director | Aerospace Center for Excellence |
| Director | Lakeland Country Club |
| 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 (NASDAQ: BRP) 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. |
| January 2021 | 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 BRS 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 |

| Source (Name and Address) | Brief Description of Duties |
|---|------------------------------------|
| 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 (Lakeland, 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. (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 |
| 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

- o BRP Colleague, Inc. 401(k)
- o Fidelity IRA-Spousal (Owner: SP)
- o Fidelity Joint TBE (Owner: JT)
LOCATION: US

- Fidelity Roth IRA
- Fidelity Roth IRA (Owner: SP)
- 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: Hon. Scott Franklin , 08/13/2021