



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

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

## 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
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	\$15,001 - \$50,000	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 ⇒ DGHM AllCap Value 401k [OT]	SP	\$15,001 - \$50,000	None		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
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 ⇒ Air Products and Chemicals, Inc. (APD) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Alibaba Group Holding Limited American Depository 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 ⇒ AT&T Inc. (T) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Biogen Inc. (BIIB) [ST]		\$1,001 - \$15,000	None		

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Moran Wealth IRA ⇒ Bristol-Myers Squibb Company (BMY) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Cadence Design Systems, Inc. (CDNS) [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 ⇒ Edwards Lifesciences Corporation (EW) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Fiat Chrysler Automobiles N.V. Common Shares (FCAU) [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 ⇒ Lockheed Martin Corporation (LMT) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Mastercard Incorporated (MA) [ST]		\$1,001 - \$15,000	None		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Moran Wealth IRA ⇒ Molina Healthcare Inc (MOH) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Monster Beverage Corporation (MNST) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Parker-Hannifin Corporation (PH) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ PerkinElmer, Inc. (PKI) [ST]		None	None		
Moran Wealth IRA ⇒ Republic Services, Inc. (RSG) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Sony Group Corporation American Depository Shares (SONY) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ T-Mobile US, Inc. (TMUS) [ST]		\$1,001 - \$15,000	None		
Moran Wealth IRA ⇒ Trane Technologies plc (TT) [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 ⇒ Washington Federal, Inc. (WAFD) [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		
Moran Wealth Management [OL]		\$100,001 - \$250,000	Capital Gains	\$100,001 - \$1,000,000	\$15,001 - \$50,000

LOCATION: Naples, Collier, FL, US

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
DESCRIPTION: Wealth management firm					

\* 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	\$22,029.47
Moran Wealth Management LLC	Salary	\$89,537.65	\$89,220.98
Educator Solutions	Spouse Salary	\$32,886.03	\$144,691.16

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Nelnet	2002	Student Loan	\$10,000 - \$15,000
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
Partner	Moran Wealth Management, LLC
Employee	Moran Wealth Management, LLC
State of Florida	Representative
Employee	Moran Edwards Asset Management LLC
Employee	Wells Fargo Advisors

### SCHEDULE F: AGREEMENTS

None disclosed.

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

None disclosed.

## SCHEDULE A ASSET CLASS DETAILS

- o Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan (Owner: SP)
- o DGHM Profit Sharing Plan 401K (Owner: SP)
- o Florida Retirement System (BD)
- o Florida Retirement System (ED) (Owner: SP)
- o Moran Wealth 401K
- o 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:** Hon. Byron Donalds , 08/13/2021