



FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

Name: Dr. Dena Grayson
Status: Congressional Candidate
State/District: FL08

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2021
Filing Date: 08/11/2021

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ACM Note [OT] DESCRIPTION: Note on receivable.	SP	Undetermined	None		
Alliant Bank Account ⇒ Bank deposit [BA] DESCRIPTION: checking	SP	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
AMG TR PC Judgments [OT] DESCRIPTION: judgments	SP	Undetermined	None		
Applied ⇒ Bank deposit [BA] DESCRIPTION: savings	SP	\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Bank of America accounts ⇒ Cash [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	\$1 - \$200
Cash Loans to Friends of Dena [DO]		\$250,001 - \$500,000	None		
Cash Loans to the Committee to Elect Alan Grayson [DO]	SP	\$1,000,001 - \$5,000,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Derivium Claims and Judgements [OT] DESCRIPTION: Claims and Judgements	SP	Undetermined	None		
Fidelity IRA ⇒ Cash [BA]		\$1 - \$1,000	Tax-Deferred		
Fidelity IRA ⇒ iShares Semiconductor ETF (SOXX) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity IRA ⇒ ProShares Short VIX Short Term Futures ETF (SVXY) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity IRA ⇒ Schwab International Small-Cap Equity ETF (SCHC) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity IRA ⇒ Vanguard Mid-Cap ETF (VO) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity IRA ⇒ Vanguard Russell 2000 ETF (VTWO) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Personal Brokerage Account ⇒ Cash [BA]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
Fidelity Simplified Employed Pension (SEP-IRA) ⇒ ARK Genomic Revolution ETF (ARKG) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Simplified Employed Pension (SEP-IRA) ⇒ Cash [BA]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Simplified Employed Pension (SEP-IRA) ⇒ DNIF [MF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Simplified Employed Pension (SEP-IRA) ⇒ First Trust NASDAQ Clean Edge Green Energy Index Fund (QCLN) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Simplified Employed Pension (SEP-		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
IRA) ⇒ Foxby Corp (FXBY) [ST]					
Fidelity Simplified Employed Pension (SEP-IRA) ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Simplified Employed Pension (SEP-IRA) ⇒ iShares Evolved U.S. Technology ETF (IETC) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Simplified Employed Pension (SEP-IRA) ⇒ ProShares Short VIX Short Term Futures ETF (SVXY) [EF]		\$100,001 - \$250,000	Tax-Deferred		
Fidelity Simplified Employed Pension (SEP-IRA) ⇒ Schwab International Small-Cap Equity ETF (SCHC) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Fidelity Simplified Employed Pension (SEP-IRA) ⇒ SPDR S&P Semiconductor ETF (XSD) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Simplified Employed Pension (SEP-IRA) ⇒ SPDR Series Trust SPDR S&P Biotech ETF (XBI) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Simplified Employed Pension (SEP-IRA) ⇒ Tortoise Energy Infrastructure Corporation (TYG) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Simplified Employed Pension (SEP-IRA) ⇒ Vanguard Large-Cap ETF (VV) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Simplified Employed Pension (SEP-IRA) ⇒ Vanguard Mid-Cap ETF (VO) [EF]		\$50,001 - \$100,000	Tax-Deferred		
Fidelity Simplified Employed Pension (SEP-IRA) ⇒ Vanguard Russell 2000 ETF (VTWO) [EF]		\$15,001 - \$50,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Fidelity Simplified Employed Pension (SEP-IRA) ⇒ Vanguard Small-Cap ETF (VB) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Fidelity Simplified Employed Pension (SEP-IRA) ⇒ Vanguard Total Stock Market ETF (VTI) [EF]		\$15,001 - \$50,000	Tax-Deferred		
G&K and K&A Notes [OT] DESCRIPTION: Notes on loans.	SP	Undetermined	None		
GL CTR PC Judgments [OT] DESCRIPTION: judgements	SP	Undetermined	None		
Grayson Consulting, Inc. ⇒ Grayson Consulting, Inc. stock [PS] DESCRIPTION: book value	SP	\$15,001 - \$50,000	None		
JP Morgan Chase ⇒ Bank deposit [BA] DESCRIPTION: checking	SP	\$1,000,001 - \$5,000,000	Interest	\$1 - \$200	\$1 - \$200
MedExpert Consulting, Inc. ⇒ MedExpert Consulting stock [PS] DESCRIPTION: S-corp income		\$100,001 - \$250,000	Dividends	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000
Merrill Lynch brokerage account ⇒ Cash [BA]		\$1 - \$1,000	Interest	\$1 - \$200	\$1 - \$200
NW Mutual Life Insurance [WU]		\$15,001 - \$50,000	None		
Profit Sharing Keogh ⇒ Cash [BA]		\$15,001 - \$50,000	Tax-Deferred		
Profit Sharing Keogh ⇒ Vanguard Mid-Cap ETF (VO) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Profit Sharing Keogh ⇒ Vanguard Small-Cap ETF (VB) [EF]		\$1,001 - \$15,000	Tax-Deferred		
Roth IRA ⇒ Cash [BA]		\$1 - \$1,000	Tax-Deferred		
Roth IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
ProShares Short VIX Short Term Futures ETF (SVXY) [EF]					
Schwab IRA ⇒ Bank Deposit [BA]	SP	\$15,001 - \$50,000	Tax-Deferred		
Sibyline Fund L.P. ⇒ Sibyline Fund partnership interest [OT]	SP	\$15,001 - \$50,000	None		
DESCRIPTION: inactive					
Sibyline Management Co. ⇒ Sibyline Management Co. stock [PS]	SP	\$15,001 - \$50,000	None		
DESCRIPTION: book value					
Suntrust ⇒ Bank deposit [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
DESCRIPTION: joint checking account					
United Mobile Technology, Inc. ⇒ United Mobile Technology, Inc. member interest [PS]	SP	\$15,001 - \$50,000	None		
DESCRIPTION: book value					
University of California Pension ⇒ US Domestic Small Cap Equity [PE]		\$1,001 - \$15,000	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
MedExpert Consulting, Inc.	salary and dividends	\$184,465.00	\$343,908.00
SBI, Inc	salary and dividends	N/A	\$87,500.00
Alan Grayson, Esq., Sole Proprietor	spouse income	N/A	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
SP	Dorothy Grayson	2018	Personal loan	\$100,001 - \$250,000
SP	US Government	2018	educational loan	\$100,001 - \$250,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Consultant	BioCryst Pharmaceuticals
Head of Clinical Development/Consultant	SBI, Inc
President	MedExpert Consulting, Inc.
Consultant	Guidepoint Global
Consultant	Curis
Consultant	Business Talent Group
Consultant	GLG Research
Consultant	Bauman Foundation

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
Business Talent Group (Pacific Palisades, CA, US)	Consulting
SBI, Inc (San Diego, CA, US)	Clinical development
BioCryst Pharmaceuticals (Durham, NC, US)	Consulting
Curis (Lexington, MA, US)	Consulting

SCHEDULE A ASSET CLASS DETAILS

- o Alliant Bank Account (Owner: SP)
LOCATION: US
- o Applied (Owner: SP)
LOCATION: Wilmington, DE, US
DESCRIPTION: savings account

- Bank of America accounts
LOCATION: US
- Fidelity IRA
- Fidelity Personal Brokerage Account
LOCATION: US
- Fidelity Simplified Employed Pension (SEP-IRA)
- Grayson Consulting, Inc. (Owner: SP)
LOCATION: Orlando, FL, US
DESCRIPTION: consulting
- JP Morgan Chase (Owner: SP)
LOCATION: New York, NY, US
DESCRIPTION: checking account
- MedExpert Consulting, Inc.
LOCATION: US
- Merrill Lynch brokerage account
LOCATION: US
- Profit Sharing Keogh
- Roth IRA
- Schwab IRA (Owner: SP)
- Sibylline Fund L.P. (Owner: SP)
LOCATION: Orlando, FL, US
DESCRIPTION: Inactive
- Sibylline Management Co. (Owner: SP)
LOCATION: Orlando, FL, US
DESCRIPTION: management company
- Suntrust (Owner: JT)
LOCATION: Orlando, FL, US
DESCRIPTION: checking account
- United Mobile Technology, Inc. (Owner: SP)
LOCATION: Orlando, FL, US
DESCRIPTION: mobile technology
- University of California Pension

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: Dr. Dena Grayson , 08/11/2021