



# FINANCIAL DISCLOSURE REPORT

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

## FILER INFORMATION

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

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2021  
**Filing Date:** 08/9/2022

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan ⇒ AF Europac Growth R6 [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan ⇒ FID 500 Index [MF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan ⇒ FID Freedom 2040 K [MF]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan ⇒ FID SM Cap Idx Large Cap [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan ⇒ I O Develop Mkt R6 Small Cap [MF]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Florida Retirement System (ED) ⇒ FRS 2045 Retirement Fund (2045) [DB]	SP	\$15,001 - \$50,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒		\$1,001 - \$15,000	None		<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Bristol-Myers Squibb Company (BMY) [ST]					<input type="checkbox"/>
Moran Wealth IRA ⇒ Brunswick Corporation (BC) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Brunswick Corporation (BC) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Cadence Design Systems, Inc. (CDNS) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Cadence Design Systems, Inc. (CDNS) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Carlisle Companies Incorporated (CSL) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Carlisle Companies Incorporated (CSL) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Cash [IH]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Cash [IH]	SP	\$1 - \$1,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Celanese Corporation Celanese Corporation (CE) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Chemed Corp (CHE) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Chemed Corp (CHE) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Edwards Lifesciences Corporation (EW) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Edwards Lifesciences Corporation (EW) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Expeditors International of Washington, Inc. (EXPD) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Moran Wealth IRA ⇒ Expeditors International of Washington, Inc. (EXPD) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Faurecia SA Ordinary Shares (FURCF) [ST]		\$1 - \$1,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Fortinet, Inc. (FTNT) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Fortinet, Inc. (FTNT) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ General Motors Company (GM) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Ingersoll Rand Inc. (IR) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Intuit Inc. (INTU) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Intuit Inc. (INTU) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Intuitive Surgical, Inc. (ISRG) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Intuitive Surgical, Inc. (ISRG) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Lockheed Martin Corporation (LMT) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Lockheed Martin Corporation (LMT) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Mastercard Incorporated (MA) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Mastercard Incorporated (MA) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Molina Healthcare Inc (MOH) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Moran Wealth IRA ⇒ Molina Healthcare Inc (MOH) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Monster Beverage Corporation (MNST) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Monster Beverage Corporation (MNST) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Parker-Hannifin Corporation (PH) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Parker-Hannifin Corporation (PH) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ PerkinElmer, Inc. (PKI) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ PerkinElmer, Inc. (PKI) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Regeneron Pharmaceuticals, Inc. (REGN) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Regeneron Pharmaceuticals, Inc. (REGN) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Robert Half International Inc. (RHI) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Robert Half International Inc. (RHI) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Shopify Inc. Class A Subordinate Voting Shares (SHOP) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Shopify Inc. Class A Subordinate Voting Shares (SHOP) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Sony Group Corporation American Depositary Shares (SONY) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income</b>	<b>Tx. &gt; \$1,000?</b>
Moran Wealth IRA ⇒ Sony Group Corporation American Depositary Shares (SONY) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Stellantis N.V. Common Shares (STLA) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Stellantis N.V. Common Shares (STLA) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Take-Two Interactive Software, Inc. (TTWO) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Take-Two Interactive Software, Inc. (TTWO) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Trane Technologies plc (TT) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Trane Technologies plc (TT) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Veeva Systems Inc. Class A (VEEV) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Veeva Systems Inc. Class A (VEEV) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Verizon Communications Inc. (VZ) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Verizon Communications Inc. (VZ) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Washington Federal, Inc. (WAFD) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Washington Federal, Inc. (WAFD) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Zebra Technologies Corporation - Class A (ZBRA) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Zebra Technologies Corporation - Class A (ZBRA) [ST]					
Moran Wealth IRA ⇒ Zions Bancorporation N.A. (ZION) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Zions Bancorporation N.A. (ZION) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Zoetis Inc. Class A (ZTS) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Moran Wealth IRA ⇒ Zoetis Inc. Class A (ZTS) [ST]	SP	\$1,001 - \$15,000	None		<input type="checkbox"/>
Optima Ed, LLC, 81% Interest [OL]	SP	\$100,001 - \$250,000	None		<input type="checkbox"/>
LOCATION: Naples, FL, US					
DESCRIPTION: Education Services Company					

\* 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 B: TRANSACTIONS

None disclosed.

## SCHEDULE C: EARNED INCOME

Source	Type	Amount
Educator Solutions	Spouse Salary	\$174,159.62
US House of Representatives	Salary	\$149,369.58

## SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
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
Representative	US House of Representatives
Representative	Collier County Republican Executive Committee

## SCHEDULE F: AGREEMENTS

None disclosed.

## SCHEDULE G: GIFTS

None disclosed.

## SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

None disclosed.

## SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

## SCHEDULE A AND B ASSET CLASS DETAILS

- Boston Private Financial Holdings, Inc. 401(K) Profit Sharing Plan (Owner: SP)
- Florida Retirement System (ED) (Owner: SP)
- Moran Wealth IRA
- Moran Wealth IRA (Owner: SP)

## EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

**IPO:** Did you purchase any shares that were allocated as a part of an Initial Public Offering?

Yes  No

**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 , 08/9/2022