

BYRON DONALDS
19TH DISTRICT, FLORIDA

DONALDS.HOUSE.GOV

COMMITTEE ON FINANCIAL SERVICES
COMMITTEE ON OVERSIGHT AND ACCOUNTABILITY

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November 8, 2024

Re: Amendments to previously filed Financial Disclosure Statement

Dear Mr. McCumber, Acting Clerk:

It has been brought to my attention that my previously filed financial disclosure report for the Years 2022-23, did not include disclosure of two certain retirement accounts and their underlying assets. The following information serves to amend Schedule A, of my financial disclosure report.

Schedule A:

2022

Asset	Owner	Value of Asset	Income Type	Income	Tx. > \$1,000
Boston Financial Holdings, Inc. 401k Profit Sharing Plan → AF Europac Growth R6	SP	\$1,001-\$15,000	Tax-Deferred		
Boston Financial Holdings, Inc. 401k Profit Sharing Plan → FID 500 Index	SP	\$15,001-\$50,001	Tax-Deferred		
Boston Financial Holdings, Inc. 401k Profit Sharing Plan → FID Freedom 2040 K	SP	\$15,001-\$50,001	Tax-Deferred		
Boston Financial Holdings, Inc. 401k Profit Sharing Plan → FID SM Cap Idx Large Cap	SP	\$1,001-\$15,000	Tax-Deferred		
Boston Financial Holdings, Inc. 401k Profit Sharing Plan → I O Develop Mkt R6 Small Cap	SP	\$1,001-\$15,000	Tax-Deferred		

OFFICE OF THE CLERK
U.S. HOUSE OF REPRESENTATIVES

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LEGISLATIVE RESOURCE CENTER

HAND DELIVERED

2023

<u>Asset</u>	<u>Owner</u>	<u>Value of Asset</u>	<u>Income Type</u>	<u>Income</u>	<u>Tx. ></u> <u>\$1,000</u>
Inspira Financial IRA → Cash Sweep Account	SP	\$50,001- \$100,000	Tax- Deferred		

In addition, it has been brought to my attention that my previously filed financial disclosure report for the Years 2021-23 did not include disclosure of certain transactions that occurred during that year. The following information serves to amend Schedule B of my financial disclosure report.

Schedule B:

<u>Asset</u>	<u>Owner</u>	<u>Date</u>	<u>Tx. Type</u>	<u>Amount</u>	<u>Cap</u> <u>Gains</u> <u>></u> <u>\$200</u>
Intuitive Surgical Inc New (ISRG)		01/05/21	P	\$1,001- \$15,000	
Shopify Inc Cl A (SHOP)		01/05/21	P	\$1,001- \$15,000	
Veeva Systems Inc Cl A (VEEV)		01/05/21	P	\$1,001- \$15,000	
Bristol Myers Squibb Cntngt VL RT		01/05/21	S	\$1,001- \$15,000	
Alibaba Group Holding (BABA)		01/05/21	S	\$1,001- \$15,000	
Republic Services Inc (RSG)		01/05/21	S	\$1,001- \$15,000	
United Health Group Inc. (UNH)		01/05/21	S	\$1,001- \$15,000	
Logitech Intl Sa (LOGI)		02/02/21	P	\$1,001- \$15,000	
Take-Two Software (TTWO)		02/02/21	P	\$1,001- \$15,000	
Zions Bancorporation NA (ZION)		02/02/21	P	\$1,001- \$15,000	
Biogen Inc. (BIIB)		02/02/21	S	\$1,001- \$15,000	
Ciena Corp. New (CIEN)		02/02/21	S	\$1,001- \$15,000	
AT&T Inc (T)		02/02/21	S	\$1,001- \$15,000	
Large Cap Stock Fund (Florida Retirement System)		03/04/21	S	\$1,001- \$15,000	
Small Mid Cap Stock Fund (Florida Retirement System)		03/04/21	S	\$1,001- \$15,000	
Edwards Life Sciences Corp (EW)		03/05/21	P	\$1,001- \$15,000	
Take-Two Software (TTWO)		03/05/21	P	\$1,001-	

				\$15,000	
DGHM AllCap Value 401k (DGHM Profit Sharing Plan 401k)		04/28/21	S	\$15,001-\$50,000	
DGHM SmallCap Value 401k (DGHM Profit Sharing Plan 401k)		04/28/21	S	\$15,001-\$50,000	
DGHM UltraValue 401k (DGHM Profit Sharing Plan 401k)		04/28/21	S	\$15,001-\$50,000	
Ametek Inc. (AME)	SP	05/05/21	P	\$1,001-\$15,000	
Air Prods & Chems Inc. (APD)	SP	05/05/21	P	\$1,001-\$15,000	
Cadence Design System (CDNS)	SP	05/05/21	P	\$1,001-\$15,000	
Chemed Corp (CHE)	SP	05/05/21	P	\$1,001-\$15,000	
Carlisle Cos Inc (CSL)	SP	05/05/21	P	\$1,001-\$15,000	
Edwards Life Sciences Corp (EW)	SP	05/05/21	P	\$1,001-\$15,000	
Fortinet Inc. (FTNT)	SP	05/05/21	P	\$1,001-\$15,000	
Honeywell Intl Inc (HON)	SP	05/05/21	P	\$1,001-\$15,000	
Intuit (INTU)	SP	05/05/21	P	\$1,001-\$15,000	
Intuitive Surgical Inc New (ISRG)	SP	05/05/21	P	\$1,001-\$15,000	
Lockheed Martin Corp (LMT)	SP	05/05/21	P	\$1,001-\$15,000	
Logitech Intl Sa (LOGI)	SP	05/05/21	P	\$1,001-\$15,000	
Mastercard Cl A (MA)	SP	05/05/21	P	\$1,001-\$15,000	
Monster Beverage Corp (MNST)	SP	05/05/21	P	\$1,001-\$15,000	
Molina Healthcare Inc (MOH)	SP	05/05/21	P	\$1,001-\$15,000	
Parker-Hannifin Corp (PH)	SP	05/05/21	P	\$1,001-\$15,000	
Revvity Inc. (RVTY)	SP	05/05/21	P	\$1,001-\$15,000	
Shopify Inc Cl A (SHOP)	SP	05/05/21	P	\$1,001-\$15,000	
Sony Group Corp (SONY)	SP	05/05/21	P	\$1,001-\$15,000	
Stellantis NV (STLA)	SP	05/05/21	P	\$1,001-\$15,000	
T-Mobile US Inc (TMUS)	SP	05/05/21	P	\$1,001-\$15,000	
Trane Technologies Inc (TT)	SP	05/05/21	P	\$1,001-	

				\$15,000	
Take-Two Software (TTWO)	SP	05/05/21	P	\$1,001-\$15,000	
Veeva Systems Inc Cl A (VEEV)	SP	05/05/21	P	\$1,001-\$15,000	
Verizon Communications Inc (VZ)	SP	05/05/21	P	\$1,001-\$15,000	
Washington Fed Inc (WAFD)	SP	05/05/21	P	\$1,001-\$15,000	
Zebra Technologies Corp Cl A (ZBRA)	SP	05/05/21	P	\$1,001-\$15,000	
Zions Bancorporation NA (ZION)	SP	05/05/21	P	\$1,001-\$15,000	
Zoetis Inc Cl A (ZTS)	SP	05/05/21	P	\$1,001-\$15,000	
Brunswick Corp (BC)		06/02/21	P	\$1,001-\$15,000	
Brunswick Corp (BC)	SP	06/02/21	P	\$1,001-\$15,000	
Expeditors Intl Wash Inc (EXPD)		06/02/21	P	\$1,001-\$15,000	
Expeditors Intl Wash Inc (EXPD)	SP	06/02/21	P	\$1,001-\$15,000	
Ametek Inc. (AME)		06/02/21	S	\$1,001-\$15,000	
Ametek Inc. (AME)	SP	06/02/21	S	\$1,001-\$15,000	
Air Prods & Chems Inc. (APD)		06/02/21	S	\$1,001-\$15,000	
Air Prods & Chems Inc. (APD)	SP	06/02/21	S	\$1,001-\$15,000	
Celanese Corp (CE)		08/03/21	P	\$1,001-\$15,000	
Celanese Corp (CE)	SP	08/03/21	P	\$1,001-\$15,000	
Robert Half Inc (RHI)		08/03/21	P	\$1,001-\$15,000	
Robert Half Inc (RHI)	SP	08/03/21	P	\$1,001-\$15,000	
Honeywell Intl Inc (HON)		08/03/21	P	\$1,001-\$15,000	
Honeywell Intl Inc (HON)	SP	08/03/21	P	\$1,001-\$15,000	
T-Mobile US Inc (TMUS)		08/03/21	P	\$1,001-\$15,000	
T-Mobile US Inc (TMUS)	SP	08/03/21	P	\$1,001-\$15,000	
Regeneron Pharmaceuticals (REGN)		10/05/21	P	\$1,001-\$15,000	
Regeneron Pharmaceuticals (REGN)	SP	10/05/21	P	\$1,001-	


				\$15,000	
Logitech Intl Sa (LOGI)		10/05/21	S	\$1,001-\$15,000	
Logitech Intl Sa (LOGI)	SP	10/05/21	S	\$1,001-\$15,000	
State Street Equity 500 Index Fund Class K (Moran Wealth 401K)		03/31/22	S	\$1,001-\$15,000	
Vanguard Strategic Equity Fund – Investor (Moran Wealth 401K)		03/31/22	S	\$1,001-\$15,000	
Vanguard Total Stock Market Index Fund—Admiral (VTSAX) (Moran Wealth 401K)		03/31/22	P	\$1,001-\$15,000	
Vanguard Mid Cap Index Fund – Admiral (Moran Wealth 401K)		03/31/22	P	\$1,001-\$15,000	
Boston Financial Holdings, Inc. 401k Profit Sharing Plan → AF Europac Growth R6	SP	11/16/23	S	\$1,001-\$15,000	
Boston Financial Holdings, Inc. 401k Profit Sharing Plan → FID 500 Index	SP	11/16/23	S	\$15,001-\$50,001	
Boston Financial Holdings, Inc. 401k Profit Sharing Plan → FID Freedom 2040 K	SP	11/16/23	S	\$15,001-\$50,001	
Boston Financial Holdings, Inc. 401k Profit Sharing Plan → FID SM Cap Idx Large Cap	SP	11/16/23	S	\$1,001-\$15,000	
Boston Financial Holdings, Inc. 401k Profit Sharing Plan → I O Develop Mkt R6 Small Cap	SP	11/16/23	S	\$1,001-\$15,000	

In addition, it has been brought to my attention that my previously filed financial disclosure report for the Years 2020-2021 did not include disclosure of a certain agreement that was in place during that year. The following information serves to amend Schedule F of my financial disclosure report.

Date	Parties to	Terms of Agreement
November 2016	Myself and State of Florida	State Pension Plan

If you require additional information regarding these amendments, please contact my Chief of Staff Meghan Perez-Acosta at (202) 225-2536.

Respectfully submitted,



Representative Byron Donalds