



Filing ID #10057719

# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Hon. C. Scott Franklin  
**Status:** Member  
**State/District:** FL18

## FILING INFORMATION

**Filing Type:** Annual Report  
**Filing Year:** 2023  
**Filing Date:** 08/8/2024

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of Central Florida Checking Accounts [BA]	JT	\$250,001 - \$500,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
BRP Colleague, Inc. 401(k) ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
DESCRIPTION: Employer 401(k) Plan. 100% invested in VFIAX (Large Blend)					
Fidelity Joint TBE ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	JT	\$1,001 - \$15,000	None		<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Apple Inc. - Common Stock (AAPL) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]	JT	\$15,001 - \$50,000	None		<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Cisco Systems, Inc. - Common Stock (CSCO) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Fidelity Cash Reserves (FDRXX) [MF]	JT	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Joint TBE ⇒ Home Depot, Inc. (HD) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Johnson & Johnson Common Stock (JNJ) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Kenvue Inc. Common Stock (KVUE) [ST]	JT	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Joint TBE ⇒ McDonald's Corporation Common Stock (MCD) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ PepsiCo, Inc. - Common Stock (PEP) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Procter & Gamble Company (PG) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Starbucks Corporation - Common Stock (SBUX) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]	JT	\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Visa Inc. (V) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Walmart Inc. Common Stock (WMT) [ST]	JT	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Roth IRA ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]		\$1,001 - \$15,000	None		<input type="checkbox"/>
Fidelity Roth IRA ⇒ Cisco Systems, Inc. - Common Stock (CSCO) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Comcast Corporation - Class A Common Stock (CMCSA) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Discover Financial Services Common Stock (DFS) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	\$1,001 - \$15,000	Interest	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Cash Reserves (FDRXX) [MF]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Contra Fund (FCNTX) [MF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Floating Rate High Income (FFRHX) [MF]	SP	\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Mid-Cap Stock Fund (FMCSX) [MF]	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Mid-Cap Stock Fund (FMCSX) [MF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Nasdaq Composite Index ETF (ONEQ) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Fidelity Quality Factor ETF (FQAL) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Home Depot, Inc. (HD) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Roth IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$15,001 - \$50,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ iShares Core Dividend Growth ETF (DGRO) [EF]	SP	\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]	SP	\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Johnson & Johnson Common Stock (JNJ) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Kenvue Inc. Common Stock (KVUE) [ST]		\$1 - \$1,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Lord Abbett Short Duration High Yield Fund Class I (LSYIX) [MF]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Lord Abbett Ultra Short Bond Fund - Class I (LUBYX) [MF]		\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Lord Abbett Ultra Short Bond Fund - Class I (LUBYX) [MF]	SP	\$1,001 - \$15,000	Interest	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ McDonald's Corporation Common Stock (MCD) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Roth IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ NextEra Energy, Inc. Common Stock (NEE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ PepsiCo, Inc. - Common Stock (PEP) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Pfizer, Inc. Common Stock (PFE) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Starbucks Corporation - Common Stock (SBUX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]		\$1,001 - \$15,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Visa Inc. (V) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Roth IRA ⇒ Walmart Inc. Common Stock (WMT) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$50,001 - \$100,000	None		<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]		\$50,001 - \$100,000	None		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Traditional IRA ⇒ Cisco Systems, Inc. - Common Stock (CSCO) [ST]		\$50,001 - \$100,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Comcast Corporation - Class A Common Stock (CMCSA) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input checked="" type="checkbox"/>
Fidelity Traditional IRA ⇒ Discover Financial Services Common Stock (DFS) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Fidelity Cash Reserves (FDRXX) [MF]		\$100,001 - \$250,000	Interest	\$2,501 - \$5,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Fidelity Mid-Cap Stock Fund (FMCSX) [MF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Home Depot, Inc. (HD) [ST]		\$100,001 - \$250,000	Dividends	\$2,501 - \$5,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Invesco QQQ Trust, Series 1 (QQQ) [EF]		\$100,001 - \$250,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ iShares Core S&P Small-Cap ETF (IJR) [EF]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Johnson & Johnson Common Stock (JNJ) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Kenvue Inc. Common Stock (KVUE) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Lord Abbett Short Duration High Yield Fund Class I (LSYIX) [MF]		\$50,001 - \$100,000	Interest	\$2,501 - \$5,000	<input checked="" type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Traditional IRA ⇒ Lord Abbett Ultra Short Bond Fund - Class I (LUBYX) [MF]		\$100,001 - \$250,000	Interest	\$5,001 - \$15,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ McDonald's Corporation Common Stock (MCD) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$100,001 - \$250,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ NextEra Energy, Inc. Common Stock (NEE) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ PepsiCo, Inc. - Common Stock (PEP) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Pfizer, Inc. Common Stock (PFE) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Procter & Gamble Company (PG) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Starbucks Corporation - Common Stock (SBUX) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]		\$15,001 - \$50,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Visa Inc. (V) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Walmart Inc. Common Stock (WMT) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	<input type="checkbox"/>
OK3 Capital Holdings, LLC [BA]		\$1 - \$1,000	Interest	\$1 - \$200	<input type="checkbox"/>
DESCRIPTION: Checking account associated with this LLC.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
OK3 Properties, LLC [RP]		\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Polk, FL, US DESCRIPTION: Lakeland, Florida commercial rental #1					
OK3 Properties, LLC [RP]		\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	<input type="checkbox"/>
LOCATION: Polk, FL, US DESCRIPTION: Lakeland, Florida commercial rental property #2					
Pacific Life VUL policy [WU]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
PruLife Custom Premier Life Insurance Policy [WU]		\$50,001 - \$100,000	Tax-Deferred		<input type="checkbox"/>
The Baldwin Insurance Group, Inc. - Class A Common Stock (BRP) [ST]		\$5,000,001 - \$25,000,000	None		<input type="checkbox"/>

\* Investment vehicle 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

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Joint TBE ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	JT	09/11/2023	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Apple Inc. (AAPL) [ST]	JT	02/15/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Apple Inc. (AAPL) [ST]	JT	04/19/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Apple Inc. (AAPL) [ST]	JT	09/11/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Berkshire Hathaway Inc. (BRK.A) [ST]	JT	02/21/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	JT	02/15/2023	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>



Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Joint TBE ⇒ Berkshire Hathaway Inc. New (BRK.B) [ST]	JT	09/11/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Cisco Systems, Inc. (CSCO) [ST]	JT	02/15/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Cisco Systems, Inc. (CSCO) [ST]	JT	09/11/2023	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Comcast Corporation - Class A (CMCSA) [ST]	JT	02/15/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Discover Financial Services (DFS) [ST]	JT	09/11/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Fidelity Mid-Cap Stock Fund (FMCSX) [AB] DESCRIPTION: Fidelity Mid-Cap Stock Fund (FMCSX)	JT	09/11/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Fidelity Money Market Fund - Premium Class [CS] DESCRIPTION: FZDXX is a Fidelity "Prime" money market fund that invests in commercial paper and non-government securities.	JT	09/11/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ FMCSX [OT] LOCATION: US DESCRIPTION: mutual fund	JT	04/19/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Home Depot, Inc. (HD) [ST]	JT	09/11/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Invesco QQQ Trust, Series 1 (QQQ) [ST]	JT	02/15/2023	S (partial)	\$50,001 - \$100,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Invesco QQQ Trust, Series 1 (QQQ) [ST]	JT	02/21/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Invesco QQQ Trust, Series 1 (QQQ) [ST]	JT	04/19/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Invesco QQQ Trust, Series 1 (QQQ) [ST]	JT	09/11/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Joint TBE ⇒ iShares Core S&P Small-Cap ETF (IJR) [ST]	JT	02/15/2023	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ iShares Core S&P Small-Cap ETF (IJR) [ST]	JT	04/19/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ iShares Core S&P Small-Cap ETF (IJR) [ST]	JT	09/11/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Johnson & Johnson (JNJ) [ST]	JT	09/11/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ JP Morgan Chase & Co. (JPM) [ST]	JT	02/15/2023	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ JP Morgan Chase & Co. (JPM) [ST]	JT	09/11/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ McDonald's Corporation (MCD) [ST]	JT	09/11/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Medtronic plc. Ordinary Shares (MDT) [ST]	JT	02/15/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	JT	09/11/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Microsoft Corporation (MSFT) [ST]	JT	02/15/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Microsoft Corporation (MSFT) [ST]	JT	02/21/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Microsoft Corporation (MSFT) [ST]	JT	09/11/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ NextEra Energy, Inc. (NEE) [ST]	JT	02/15/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ NextEra Energy, Inc. (NEE) [ST]	JT	09/11/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒	JT	09/11/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Pepsico, Inc. (PEP) [ST]			(partial)		<input type="checkbox"/>
Fidelity Joint TBE ⇒ Pfizer, Inc. (PFE) [ST]	JT	02/15/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Pfizer, Inc. (PFE) [ST]	JT	09/11/2023	S	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ PNC Financial Services Group, Inc. (PNC) [ST]	JT	02/15/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Procter & Gamble Company (PG) [ST]	JT	09/11/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Starbucks Corporation (SBUX) [ST]	JT	02/15/2023	S (partial)	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Starbucks Corporation (SBUX) [ST]	JT	04/19/2023	S (partial)	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Starbucks Corporation (SBUX) [ST]	JT	09/11/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ United Parcel Service, Inc. (UPS) [ST]	JT	02/15/2023	S	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ United Parcel Service, Inc. (UPS) [ST]	JT	09/11/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	JT	02/15/2023	S (partial)	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	JT	09/11/2023	S	\$15,001 - \$50,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Verizon Communications Inc. (VZ) [ST]	JT	02/15/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
Fidelity Joint TBE ⇒ Visa Inc. (V) [ST]	JT	09/11/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Joint TBE ⇒ Walmart Inc. (WMT) [ST]	JT	02/21/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Joint TBE ⇒ Walmart Inc. (WMT) [ST]	JT	09/11/2023	S (partial)	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
Fidelity Roth IRA ⇒ Comcast Corporation - Class A (CMCSA) [ST]		04/19/2023	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Costco Wholesale Corporation (COST) [ST]		04/19/2023	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ FCNTX [OT]  LOCATION: US DESCRIPTION: mutual fund	SP	04/19/2023	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ FFRHX [OT]  LOCATION: US DESCRIPTION: mutual fund	SP	04/19/2023	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Fidelity Quality Factor ETF (FQAL) [ST]	SP	04/19/2023	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ FSKAX [OT]  LOCATION: US DESCRIPTION: Mutual Fund		04/19/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Roth IRA ⇒ iShares Core S&P 500 ETF (IVV) [ST]	SP	04/19/2023	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ LSYIX [OT]  LOCATION: US DESCRIPTION: mutual fund		04/19/2023	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ LUBYX [OT]  LOCATION: US DESCRIPTION: mutual fund		04/19/2023	S (partial)	\$1,001 - \$15,000	<input type="checkbox"/>
Fidelity Traditional IRA ⇒ Comcast Corporation - Class A (CMCSA) [ST]		04/19/2023	P	\$50,001 - \$100,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Traditional IRA ⇒ Costco Wholesale Corporation (COST) [ST]		04/19/2023	P	\$50,001 - \$100,000	
Fidelity Traditional IRA ⇒ FSKAX [OT]		04/19/2023	S	\$50,001 - \$100,000	<input type="checkbox"/>
LOCATION: US DESCRIPTION: mutual fund					
Fidelity Traditional IRA ⇒ LSYIX [OT]		04/19/2023	P	\$50,001 - \$100,000	
LOCATION: US DESCRIPTION: mutual fund					

\* Investment vehicle 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

None disclosed.

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	James C. Franklin, Jr.	December, 2020	Note on two commercial office buildings owned by OK3 Properties, LLC	\$1,000,001 - \$5,000,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
Member	U.S. Naval Academy Board of Visitors
COMMENTS: Designated member by the Speaker of the House of Representatives.	

### SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
January 2020	BRP Group, Inc., Baldwin Krystyn Sherman Partners, LLC, and 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, 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.

**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 INVESTMENT VEHICLE DETAILS**

- BRP Colleague, Inc. 401(k)
- 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**

**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. C. Scott Franklin , 08/8/2024