



FINANCIAL DISCLOSURE REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

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

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2023
Filing Date: 08/13/2024

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Florida Retirement System (ED) ⇒ FRS 2045 Retirement Fund [PE]	SP	\$15,001 - \$50,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Bristol-Myers Squibb Company (BMY) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Cadence Design Systems, Inc. (CDNS) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Cadence Design Systems, Inc. (CDNS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Cash [IH]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Cash [IH]	SP	\$1 - \$1,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Moran Wealth IRA ⇒ Chemed Corp (CHE) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Chemed Corp (CHE) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Dynatrace, Inc. Common Stock (DT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Dynatrace, Inc. Common Stock (DT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ FactSet Research Systems Inc. (FDS) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ FactSet Research Systems Inc. (FDS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Gartner, Inc. Common Stock (IT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Gartner, Inc. Common Stock (IT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ General Motors Company (GM) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Howmet Aerospace Inc. (HWM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Howmet Aerospace Inc. (HWM) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Humana Inc. Common Stock (HUM) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Humana Inc. Common Stock (HUM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Ingersoll Rand Inc. (IR) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Intuit Inc. (INTU) [ST]					<input type="checkbox"/>
Moran Wealth IRA ⇒ Intuit Inc. (INTU) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Lockheed Martin Corporation (LMT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Lockheed Martin Corporation (LMT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Mastercard Incorporated (MA) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Mastercard Incorporated (MA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Molina Healthcare Inc (MOH) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Moran Wealth IRA ⇒ Molina Healthcare Inc (MOH) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Monolithic Power Systems, Inc. (MPWR) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Monolithic Power Systems, Inc. (MPWR) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Monster Beverage Corporation (MNST) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Monster Beverage Corporation (MNST) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ MSCI Inc. Common Stock (MSCI) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ MSCI Inc. Common Stock (MSCI) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Novo Nordisk A/S (NVO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Novo Nordisk A/S (NVO) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Parker-Hannifin Corporation (PH) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Parker-Hannifin Corporation (PH) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Regeneron Pharmaceuticals, Inc. (REGN) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Regeneron Pharmaceuticals, Inc. (REGN) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Moran Wealth IRA ⇒ RLI Corp. Common Stock (RLI) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ RLI Corp. Common Stock (RLI) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input checked="" type="checkbox"/>
Moran Wealth IRA ⇒ Sony Group Corporation American Depository Shares (SONY) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Sony Group Corporation American Depository Shares (SONY) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Trane Technologies plc (TT) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Trane Technologies plc (TT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Veeva Systems Inc. Class A (VEEV) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Veeva Systems Inc. Class A (VEEV) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Vertex Pharmaceuticals Incorporated (VRTX) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Vertex Pharmaceuticals Incorporated (VRTX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Zoetis Inc. Class A (ZTS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Moran Wealth IRA ⇒ Zoetis Inc. Class A (ZTS) [ST]		\$1,001 - \$15,000	Tax-Deferred		<input type="checkbox"/>
Onesto LLC [OL]	SP	\$500,001 - \$1,000,000	None		<input type="checkbox"/>
LOCATION: Naples, FL, US					
DESCRIPTION: Consulting and Business Services Company					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Optima Ed, LLC, 81% Interest [OL]	SP	Spouse/DC Over \$1,000,000	None		<input type="checkbox"/>
LOCATION: FL, FL, US					
DESCRIPTION: Education Services Company					

* 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?
Moran Wealth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	10/19/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		10/19/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Arch Resources, Inc. Class A Common Stock (ARCH) [ST]	SP	07/5/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Arch Resources, Inc. Class A Common Stock (ARCH) [ST]		07/5/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Dynatrace, Inc. Common Stock (DT) [ST]	SP	10/19/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Dynatrace, Inc. Common Stock (DT) [ST]		10/19/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Edwards Lifesciences Corporation Common Stock (EW) [ST]	SP	10/19/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Edwards Lifesciences Corporation Common Stock (EW) [ST]		10/19/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Elevance Health, Inc. Common Stock (ELV) [ST]	SP	10/19/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Elevance Health, Inc. Common Stock (ELV) [ST]		10/19/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Fortinet, Inc. - Common Stock (FTNT) [ST]		02/24/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Moran Wealth IRA ⇒ Fortinet, Inc. - Common Stock (FTNT) [ST]	SP	02/24/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Gartner, Inc. Common Stock (IT) [ST]		02/24/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Gartner, Inc. Common Stock (IT) [ST]	SP	02/24/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Humana Inc. Common Stock (HUM) [ST]		02/24/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Humana Inc. Common Stock (HUM) [ST]	SP	02/24/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Intuitive Surgical, Inc. - Common Stock (ISRG) [ST]		02/24/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Intuitive Surgical, Inc. - Common Stock (ISRG) [ST]	SP	02/24/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]	SP	10/19/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		10/19/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]	SP	07/5/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]		07/5/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	07/5/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		07/5/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ MSCI Inc. Common Stock (MSCI) [ST]		02/24/2023	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Moran Wealth IRA ⇒ MSCI Inc. Common Stock (MSCI) [ST]	SP	02/24/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	10/19/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		10/19/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ QuidelOrtho Corporation - Common Stock (QDEL) [ST]	SP	10/19/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ QuidelOrtho Corporation - Common Stock (QDEL) [ST]		10/19/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Revvity, Inc. Common Stock (RVTY) [ST] DESCRIPTION: Company f/k/a PerkinElmer, Inc. (PKI)	SP	07/5/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Revvity, Inc. Common Stock (RVTY) [ST] DESCRIPTION: Company f/k/a PerkinElmer, Inc. (PKI)		07/5/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ RLI Corp. Common Stock (RLI) [ST]	SP	07/5/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ RLI Corp. Common Stock (RLI) [ST]		07/5/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ STMicroelectronics N.V. Common Stock (STM) [ST]		02/24/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ STMicroelectronics N.V. Common Stock (STM) [ST]	SP	02/24/2023	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ STMicroelectronics N.V. Common Stock (STM) [ST]	SP	10/19/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ STMicroelectronics N.V. Common Stock (STM) [ST]		10/19/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ WaFd, Inc. - Common Stock (WAFD) [ST]	SP	07/5/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Moran Wealth IRA ⇒ WaFd, Inc. - Common Stock (WAFD) [ST]		07/5/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Waters Corporation Common Stock (WAT) [ST]		02/24/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Waters Corporation Common Stock (WAT) [ST]	SP	02/24/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Zebra Technologies Corporation - Class A Common Stock (ZBRA) [ST]		02/24/2023	S	\$1,001 - \$15,000	<input type="checkbox"/>
Moran Wealth IRA ⇒ Zebra Technologies Corporation - Class A Common Stock (ZBRA) [ST]	SP	02/24/2023	S	\$1,001 - \$15,000	<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 C: EARNED INCOME

Source	Type	Amount
Educator Solutions	Spouse Salary	N/A
Optima Management Services	Spouse Salary	N/A
OptimaEd, LLC	Spouse 1099	N/A
The Optima Foundation Inc.	Spouse 1099	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Chase Bank	January 2021	Credit Card	\$15,001 - \$50,000

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE G: GIFTS

None disclosed.

SCHEDULE H: TRAVEL PAYMENTS AND REIMBURSEMENTS

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Club for Growth	03/2/2023	03/5/2023	Washington, DC - Palm Beach, FL - Washington, DC	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

SCHEDULE I: PAYMENTS MADE TO CHARITY IN LIEU OF HONORARIA

None disclosed.

SCHEDULE A AND B INVESTMENT VEHICLE DETAILS

- o Florida Retirement System (ED) (Owner: SP)
- o Moran Wealth IRA
- o 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 , 08/13/2024