



Filing ID #10075306

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: 2025
Filing Date: 08/13/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Alto IRA ⇒ Bitcoin (CRYPTO:BTC) [CT]	SP	\$50,001 - \$100,000	Tax-Deferred		☒
Florida Retirement System (ED) ⇒ FRS 2045 Retirement Fund [PE]	SP	\$15,001 - \$50,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Amphenol Corporation Common Stock (APH) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Amphenol Corporation Common Stock (APH) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Moran Wealth IRA ⇒ Arista Networks, Inc. Common Stock (ANET) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Arista Networks, Inc. Common Stock (ANET) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Autodesk, Inc. - Common Stock (ADSK) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Autodesk, Inc. - Common Stock (ADSK) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Brown & Brown, Inc. Common Stock (BRO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Brown & Brown, Inc. Common Stock (BRO) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Cadence Design Systems, Inc. (CDNS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ Cadence Design Systems, Inc. (CDNS) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ Carnival Corporation Ltd. Common Shares (CCL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Carnival Corporation Ltd. Common Shares (CCL) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Cash [IH]		\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ Cash [IH]	SP	\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Moran Wealth IRA ⇒ Chipotle Mexican Grill, Inc. Common Stock (CMG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Chipotle Mexican Grill, Inc. Common Stock (CMG) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Comfort Systems USA, Inc. Common Stock (FIX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Comfort Systems USA, Inc. Common Stock (FIX) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Fortinet, Inc. - Common Stock (FTNT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Fortinet, Inc. - Common Stock (FTNT) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Howmet Aerospace Inc. (HWM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Howmet Aerospace Inc. (HWM) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Intuit Inc. (INTU) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ Intuit Inc. (INTU) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Moran Wealth IRA ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Mastercard Incorporated (MA) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ Mastercard Incorporated (MA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ McKesson Corporation Common Stock (MCK) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ McKesson Corporation Common Stock (MCK) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ Monolithic Power Systems, Inc. (MPWR) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ Monolithic Power Systems, Inc. (MPWR) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ Parker-Hannifin Corporation (PH) [ST]		\$15,001 - \$50,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Moran Wealth IRA ⇒ Parker-Hannifin Corporation (PH) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ PayPal Holdings, Inc. - Common Stock (PYPL) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ PayPal Holdings, Inc. - Common Stock (PYPL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Progressive Corporation (PGR) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Progressive Corporation (PGR) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ The Trade Desk, Inc. - Class A Common Stock (TTD) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ The Trade Desk, Inc. - Class A Common Stock (TTD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Tradeweb Markets Inc. - Class A Common Stock (TW) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Tradeweb Markets Inc. - Class A Common Stock (TW) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Trane Technologies plc (TT) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ Trane Technologies plc (TT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Moran Wealth IRA ⇒ Visa Inc. (V) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒ Visa Inc. (V) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Moran Wealth IRA ⇒		\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Zoetis Inc. Class A (ZTS) [ST]					
Moran Wealth IRA ⇒ Zoetis Inc. Class A (ZTS) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Onesto, LLC ⇒ Optima Management Services, LLC [OL]	SP	\$250,001 - \$500,000	None		☐
LOCATION: Naples, FL, US DESCRIPTION: Back office services company.					
Onesto, LLC ⇒ OptimaEd, Inc. [OL]	SP	\$500,001 - \$1,000,000	None		☐
LOCATION: Naples, FL, US DESCRIPTION: Curriculum development company. Converted to a C-Corp in November of 2025.					
Onesto, LLC ⇒ Optima Management Services, LLC ⇒ Dewalt Impact Group, LLC [OL]	SP	\$250,001 - \$500,000	Business Income	\$100,001 - \$1,000,000	☐
LOCATION: Lewes, DE, US DESCRIPTION: Single Member Managed LLC.					
Optima Ed, Inc 401k ⇒ Nuveen Lifecycle Index 2045 Fund R6 (TLXIX) [MF]	SP	\$100,001 - \$250,000	Tax-Deferred		☐

* 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 ⇒ First Citizens BancShares, Inc. - Class A Common Stock (FCNCA) [ST]		01/16/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ GoDaddy Inc. Class A Common Stock (GDDY) [ST]		01/16/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ First Citizens BancShares, Inc. - Class A Common Stock (FCNCA) [ST]		01/21/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ GoDaddy Inc. Class A Common Stock (GDDY) [ST]		01/21/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Moran Wealth IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		01/16/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ RLI Corp. Common Stock (RLI) [ST]		01/16/2025	S (partial)	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ RLI Corp. Common Stock (RLI) [ST]		01/16/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ GoDaddy Inc. Class A Common Stock (GDDY) [ST]	SP	01/16/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ First Citizens BancShares, Inc. - Class A Common Stock (FCNCA) [ST]	SP	01/21/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ DoorDash, Inc. - Common Stock (DASH) [ST]		02/13/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Fortinet, Inc. - Common Stock (FTNT) [ST]		02/13/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST]		02/13/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ FactSet Research Systems Inc. Common Stock (FDS) [ST]		02/13/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Robinhood Markets, Inc. - Class A Common Stock (HOOD) [ST]		03/06/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ The Trade Desk, Inc. - Class A Common Stock (TTD) [ST]		03/06/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Autodesk, Inc. - Common Stock (ADSK) [ST]		03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒		03/20/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Abbott Laboratories Common Stock (ABT) [ST]					
Moran Wealth IRA ⇒ Chipotle Mexican Grill, Inc. Common Stock (CMG) [ST]		03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ GoDaddy Inc. Class A Common Stock (GDDY) [ST]	SP	01/21/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	SP	01/16/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ RLI Corp. Common Stock (RLI) [ST]	SP	01/16/2025	S (partial)	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ RLI Corp. Common Stock (RLI) [ST]	SP	01/21/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ DoorDash, Inc. - Common Stock (DASH) [ST]	SP	02/13/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Fortinet, Inc. - Common Stock (FTNT) [ST]	SP	02/13/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST]	SP	02/13/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ FactSet Research Systems Inc. Common Stock (FDS) [ST]	SP	02/13/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Progressive Corporation (PGR) [ST]		03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ PayPal Holdings, Inc. - Common Stock (PYPL) [ST]		03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Fiserv, Inc. Common Stock (FI) [ST]		03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Brown & Brown, Inc. Common Stock (BRO) [ST]		03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Tradeweb Markets Inc. - Class A Common Stock (TW) [ST]		03/20/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Moran Wealth IRA ⇒ Arista Networks, Inc. Common Stock (ANET) [ST]		03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]		03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Chemed Corp (CHE) [ST]		03/06/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ First Citizens BancShares, Inc. - Class A Common Stock (FCNCA) [ST]		03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ MSCI Inc. Common Stock (MSCI) [ST]		03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Gartner, Inc. Common Stock (IT) [ST]		03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Robinhood Markets, Inc. - Class A Common Stock (HOOD) [ST]		03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ GoDaddy Inc. Class A Common Stock (GDDY) [ST]		03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Veeva Systems Inc. Class A Common Stock (VEEV) [ST]		03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ DoorDash, Inc. - Common Stock (DASH) [ST]		03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Novo Nordisk A/S Common Stock (NVO) [ST]		03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Equifax, Inc. Common Stock (EFX) [ST]		03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Vertex Pharmaceuticals Incorporated - Common Stock		03/20/2025	S	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
(VRTX) [ST]					
Moran Wealth IRA ⇒ The Trade Desk, Inc. - Class A Common Stock (TTD) [ST]	SP	03/06/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Robinhood Markets, Inc. - Class A Common Stock (HOOD) [ST]	SP	03/06/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ PayPal Holdings, Inc. - Common Stock (PYPL) [ST]	SP	03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Broadcom Inc. - Common Stock (AVGO) [ST]	SP	03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	SP	03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Autodesk, Inc. - Common Stock (ADSK) [ST]	SP	03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Abbott Laboratories Common Stock (ABT) [ST]	SP	03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Chipotle Mexican Grill, Inc. Common Stock (CMG) [ST]	SP	03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Progressive Corporation (PGR) [ST]	SP	03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Fiserv, Inc. Common Stock (FI) [ST]	SP	03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Brown & Brown, Inc. Common Stock (BRO) [ST]	SP	03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Tradeweb Markets Inc. - Class A Common Stock (TW) [ST]	SP	03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Arista Networks, Inc. Common Stock (ANET) [ST]	SP	03/20/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒	SP	03/06/2025	S	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Chemed Corp (CHE) [ST]					
Moran Wealth IRA ⇒ MSCI Inc. Common Stock (MSCI) [ST]	SP	03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Gartner, Inc. Common Stock (IT) [ST]	SP	03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Robinhood Markets, Inc. - Class A Common Stock (HOOD) [ST]	SP	03/20/2025	S	\$1,001 - \$15,000	☐
Bitcoin (CRYPTO:BTC) [CT]					
	SP	12/18/2025	P	\$50,001 - \$100,000	
Moran Wealth IRA ⇒ Comfort Systems USA, Inc. Common Stock (FIX) [ST]		12/04/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Abbott Laboratories Common Stock (ABT) [ST]		12/04/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]		08/07/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Deckers Outdoor Corporation (DECK) [ST]		08/07/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Howmet Aerospace Inc. Common Stock (HWM) [ST]		08/07/2025	S (partial)	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ State Street SPDR S&P 500 ETF Trust (SPY) [EF]		09/04/2025	P	\$15,001 - \$50,000	
Moran Wealth IRA ⇒ State Street SPDR S&P 500 ETF Trust (SPY) [EF]		10/09/2025	S	\$15,001 - \$50,000	☒
Moran Wealth IRA ⇒ Tradeweb Markets Inc. - Class A Common Stock (TW) [ST]		10/09/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ The Trade Desk, Inc. - Class A Common Stock (TTD) [ST]		10/09/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒		10/09/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Progressive Corporation (PGR) [ST]					
Moran Wealth IRA ⇒ Fortinet, Inc. - Common Stock (FTNT) [ST]		10/09/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Chipotle Mexican Grill, Inc. Common Stock (CMG) [ST]		10/09/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Carnival Corporation Common Stock (CCL) [ST]		10/09/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Brown & Brown, Inc. Common Stock (BRO) [ST]		10/09/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Progressive Corporation (PGR) [ST]		10/24/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Brown & Brown, Inc. Common Stock (BRO) [ST]		10/24/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Howmet Aerospace Inc. Common Stock (HWM) [ST]		10/23/2025	S (partial)	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Amphenol Corporation Common Stock (APH) [ST]		04/10/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Visa Inc. (V) [ST]		04/10/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Regeneron Pharmaceuticals, Inc. - Common Stock (REGN) [ST]		04/10/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Nu Holdings Ltd. Class A Ordinary Shares (NU) [ST]		04/10/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]		09/04/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Progressive Corporation (PGR) [ST]		09/04/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒		09/04/2025	S	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
The Trade Desk, Inc. - Class A Common Stock (TTD) [ST]					
Moran Wealth IRA ⇒ Tradeweb Markets Inc. - Class A Common Stock (TW) [ST]		09/04/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Brown & Brown, Inc. Common Stock (BRO) [ST]		09/04/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Chipotle Mexican Grill, Inc. Common Stock (CMG) [ST]		09/04/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Fiserv, Inc. Common Stock (FI) [ST]		09/04/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Fortinet, Inc. - Common Stock (FTNT) [ST]		09/04/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Molina Healthcare Inc Common Stock (MOH) [ST]		09/04/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]	SP	09/04/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Progressive Corporation (PGR) [ST]	SP	09/04/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ The Trade Desk, Inc. - Class A Common Stock (TTD) [ST]	SP	09/04/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Tradeweb Markets Inc. - Class A Common Stock (TW) [ST]	SP	09/04/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Brown & Brown, Inc. Common Stock (BRO) [ST]	SP	09/04/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Chipotle Mexican Grill, Inc. Common Stock (CMG) [ST]	SP	09/04/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Fiserv, Inc. Common Stock (FI) [ST]	SP	09/04/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Fortinet, Inc. - Common Stock (FTNT) [ST]	SP	09/04/2025	S	\$1,001 - \$15,000	☐

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Moran Wealth IRA ⇒ Molina Healthcare Inc Common Stock (MOH) [ST]	SP	09/04/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Amphenol Corporation Common Stock (APH) [ST]	SP	04/10/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Visa Inc. (V) [ST]	SP	04/10/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Regeneron Pharmaceuticals, Inc. - Common Stock (REGN) [ST]	SP	04/10/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Nu Holdings Ltd. Class A Ordinary Shares (NU) [ST]	SP	04/10/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ GoDaddy Inc. Class A Common Stock (GDDY) [ST]	SP	03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ First Citizens BancShares, Inc. - Class A Common Stock (FCNCA) [ST]	SP	03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Vertex Pharmaceuticals Incorporated - Common Stock (VRTX) [ST]	SP	03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Veeva Systems Inc. Class A Common Stock (VEEV) [ST]	SP	03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]	SP	03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ DoorDash, Inc. - Common Stock (DASH) [ST]	SP	03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Novo Nordisk A/S Common Stock (NVO) [ST]	SP	03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Equifax, Inc. Common Stock (EFX) [ST]	SP	03/20/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒	SP	10/09/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Tradeweb Markets Inc. - Class A Common Stock (TW) [ST]					
Moran Wealth IRA ⇒ The Trade Desk, Inc. - Class A Common Stock (TTD) [ST]	SP	10/09/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Progressive Corporation (PGR) [ST]	SP	10/09/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Fortinet, Inc. - Common Stock (FTNT) [ST]	SP	10/09/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Chipotle Mexican Grill, Inc. Common Stock (CMG) [ST]	SP	10/09/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Carnival Corporation Common Stock (CCL) [ST]	SP	10/09/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Brown & Brown, Inc. Common Stock (BRO) [ST]	SP	10/09/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Visa Inc. (V) [ST]	SP	10/24/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Howmet Aerospace Inc. Common Stock (HWM) [ST]	SP	10/23/2025	S (partial)	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ State Street SPDR S&P 500 ETF Trust (SPY) [EF]	SP	10/09/2025	S	\$1,001 - \$15,000	☒
Moran Wealth IRA ⇒ Lam Research Corporation - Common Stock (LRCX) [ST]	SP	08/07/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Deckers Outdoor Corporation (DECK) [ST]	SP	08/07/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ Comfort Systems USA, Inc. Common Stock (FIX) [ST]	SP	12/04/2025	P	\$1,001 - \$15,000	
Moran Wealth IRA ⇒ Abbott Laboratories Common Stock (ABT) [ST]	SP	12/04/2025	S	\$1,001 - \$15,000	☐
Moran Wealth IRA ⇒ State Street SPDR S&P 500 ETF Trust (SPY) [EF]	SP	09/04/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?

* 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
OptimaEd, Inc.	Spouse Salary	N/A
Dewalt Impact Group, LLC	Spouse Business Income	N/A
X Corp.	Spouse 1099 income	N/A

SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
JT	Chase Bank	January 2021	Credit Card	\$15,001 - \$50,000
	U.S. Department of Education	September 2021	Student Loan	\$250,001 - \$500,000
	Cross Country Mortgage	July 2024	Mortgage on Personal Residence	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

None disclosed.

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 INVESTMENT VEHICLE DETAILS

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- Onesto, LLC (100% Interest) (Owner: SP)
LOCATION: US
DESCRIPTION: Onesto, LLC is a holding company in which Filer's spouse is sole member.
- Moran Wealth IRA
- Alto IRA (Owner: SP)
DESCRIPTION: IRA account transferred from Inspira Financial in December 2025.
- Optima Ed, Inc 401k (Owner: SP)
- Moran Wealth IRA (Owner: SP)
- Onesto, LLC ⇒ Optima Management Services, LLC (Owner: SP)
LOCATION: US
- Florida Retirement System (ED) (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 , 08/13/2026