



Filing ID #10077449

FINANCIAL DISCLOSURE REPORT

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FILER INFORMATION

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

FILING INFORMATION

Filing Type: Annual Report
Filing Year: 2025
Filing Date: 08/10/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Bank of Central Florida Personal Checking Accounts [BA]	JT	\$15,001 - \$50,000	Interest	\$1 - \$200	☐
OK3 Capital Holdings, LLC Checking Account [BA]		\$1 - \$1,000	Interest	\$1 - \$200	☐
OK3 Properties, LLC [RP]		\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	☐
LOCATION: Polk, FL, US DESCRIPTION: Commercial Rental Property #2 at 1129 Bartow Rd., Lakeland, FL					
OK3 Properties, LLC [RP]		\$1,000,001 - \$5,000,000	Rent	\$100,001 - \$1,000,000	☐
LOCATION: Polk, FL, US DESCRIPTION: Commercial rental property #1 at 1115 Bartow Rd., Lakeland, FL					
OK3 Properties, LLC Checking Account [BA]		\$100,001 - \$250,000	Interest	\$1 - \$200	☐
Pacific Life VUL policy [WU]	SP	\$15,001 - \$50,000	None		☐
PruLife Custom Premier Life Insurance Policy [WU]		\$50,001 - \$100,000	None		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
BRP Colleague, Inc. 401(k) ⇒ Fidelity 500 Index Fund (FXAIX) [MF]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity IRA-Spousal ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	\$1 - \$1,000	Tax-Deferred		☐
Fidelity Joint TBE ⇒ FCASH [OT] DESCRIPTION: Cash holding from portfolio income within Joint	JT	None	Interest	None	☐
Fidelity Joint TBE ⇒ Fidelity Money Market Fund: Premium Class (FZDXX) [MF]	JT	\$1 - \$1,000	Interest	\$1 - \$200	☐
Fidelity Joint TBE ⇒ The Baldwin Insurance Group, Inc. - Class A Common Stock (BWIN) [ST] DESCRIPTION: Four sell exchanges: 1. \$-5,225.46 2. \$-495,143.20 3. \$-1,108,621.67 4. \$-46,582.39	JT	\$500,001 - \$1,000,000	None		☒
Fidelity Roth IRA ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Air Products and Chemicals, Inc. Common Stock (APD) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Air Products and Chemicals, Inc. Common Stock (APD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$15,001 - \$50,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST] DESCRIPTION: One buy exchange of \$4,238.46.	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Fidelity Roth IRA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
DESCRIPTION: One buy exchange of \$10,596.15.					
Fidelity Roth IRA ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Amgen Inc. - Common Stock (AMGN) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Automatic Data Processing, Inc. - Common Stock (ADP) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Automatic Data Processing, Inc. - Common Stock (ADP) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Chubb Limited Common Stock (CB) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Chubb Limited Common Stock (CB) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ FID:CASH [OT]		\$1 - \$1,000	Tax-Deferred		☐
DESCRIPTION: Cash holding from portfolio income within Roth IRA					
Fidelity Roth IRA ⇒ FID:CASH [OT]	SP	\$1 - \$1,000	Tax-Deferred		☐
DESCRIPTION: Cash holding from portfolio income within Roth IRA					
Fidelity Roth IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Advisor Mortgage Securities Fund: Class I (FMSCX) [MF]					
Fidelity Roth IRA ⇒ Fidelity Advisor Total Bond Fund: Class Z (FBKWX) [MF] DESCRIPTION: One buy exchange of \$2,425.00.		\$15,001 - \$50,000	Tax-Deferred		☒
Fidelity Roth IRA ⇒ Fidelity Advisor Total Bond Fund: Class Z (FBKWX) [MF] DESCRIPTION: One buy exchange of \$800.00.	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Fidelity Cash Reserves (FDRXX) [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Fidelity Cash Reserves (FDRXX) [MF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Fidelity Mid-Cap Stock Fund (FMCSX) [MF]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ First Trust SMID Cap Rising Dividend Achievers ETF (SDVY) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ First Trust SMID Cap Rising Dividend Achievers ETF (SDVY) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ General Dynamics Corporation Common Stock (GD) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ General Dynamics Corporation Common Stock (GD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Home Depot, Inc. (HD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Home Depot, Inc. (HD) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Illinois Tool Works Inc. Common Stock (ITW) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Roth IRA ⇒ Illinois Tool Works Inc. Common Stock (ITW) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF] DESCRIPTION: One buy exchange of \$6,681.19.		\$1,001 - \$15,000	Tax-Deferred		☒
Fidelity Roth IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF] DESCRIPTION: One buy exchange of \$3,340.59	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Fidelity Roth IRA ⇒ Johnson & Johnson Common Stock (JNJ) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Johnson & Johnson Common Stock (JNJ) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$15,001 - \$50,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST] DESCRIPTION: One buying exchange of \$2,116.84.	SP	\$1,001 - \$15,000	Tax-Deferred		☒
Fidelity Roth IRA ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST] DESCRIPTION: One buy exchange of \$2,116.84.		\$1,001 - \$15,000	Tax-Deferred		☒
Fidelity Roth IRA ⇒ Lord Abbett Short Duration High Yield Fund Class I (LSYIX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒	SP	\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Lord Abbett Short Duration High Yield Fund Class I (LSYIX) [MF]					
Fidelity Roth IRA ⇒ McDonald's Corporation Common Stock (MCD) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ McDonald's Corporation Common Stock (MCD) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$15,001 - \$50,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Novo Nordisk A/S Common Stock (NVO) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
DESCRIPTION: One buy exchange of \$3,406.45.					
Fidelity Roth IRA ⇒ Novo Nordisk A/S Common Stock (NVO) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒
DESCRIPTION: Two buying exchanges: 1. \$6,329.70 2. \$3,516.06					
Fidelity Roth IRA ⇒ Pepsico, Inc. (PEP) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Pepsico, Inc. (PEP) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Procter & Gamble Company (PG) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Procter & Gamble Company (PG) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ The Hershey Company Common Stock (HSY) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Roth IRA ⇒ The Hershey Company Common Stock (HSY) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Union Pacific Corporation Common Stock (UNP) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☒
DESCRIPTION: Two buy exchanges of: 1. \$1,137.23 2. \$2,209.68					
Fidelity Roth IRA ⇒ Union Pacific Corporation Common Stock (UNP) [ST]		\$1,001 - \$15,000	Tax-Deferred		☒
DESCRIPTION: One buying exchange of \$4,548.90					
Fidelity Roth IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Visa Inc. (V) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Visa Inc. (V) [ST]		\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Walmart Inc. - Common Stock (WMT) [ST]		\$15,001 - \$50,000	Tax-Deferred		☐
Fidelity Roth IRA ⇒ Walmart Inc. - Common Stock (WMT) [ST]	SP	\$1,001 - \$15,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ Accenture plc Class A Ordinary Shares (ACN) [ST]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ Air Products and Chemicals, Inc. Common Stock (APD) [ST]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$100,001 - \$250,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$50,001 - \$100,000	Tax-Deferred		☒
DESCRIPTION: One buy exchange of \$82,649.93.					

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Traditional IRA ⇒ Amgen Inc. - Common Stock (AMGN) [ST]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$100,001 - \$250,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ Automatic Data Processing, Inc. - Common Stock (ADP) [ST]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]		\$100,001 - \$250,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ Chubb Limited Common Stock (CB) [ST]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ FID:CASH [OT]		\$1,001 - \$15,000	Tax-Deferred		☐
DESCRIPTION: Cash holding from portfolio income within IRA					
Fidelity Traditional IRA ⇒ Fidelity Advisor Total Bond Fund: Class Z (FBKWX) [MF]		\$100,001 - \$250,000	Tax-Deferred		☒
DESCRIPTION: One buy exchange of \$15,000.					
Fidelity Traditional IRA ⇒ Fidelity Cash Reserves (FDRXX) [MF]		\$15,001 - \$50,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ Fidelity Mid-Cap Stock Fund (FMCSX) [MF]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ First Trust SMID Cap Rising Dividend Achievers ETF (SDVY) [EF]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ General Dynamics Corporation Common Stock (GD) [ST]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ Home Depot, Inc. (HD) [ST]		\$100,001 - \$250,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ Illinois Tool Works Inc. Common Stock (ITW) [ST]		\$50,001 - \$100,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Traditional IRA ⇒ Invesco NASDAQ 100 ETF (QQQM) [EF]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ iShares Core S&P 500 ETF (IVV) [EF]		\$50,001 - \$100,000	Tax-Deferred		☒
DESCRIPTION: One buy exchange of \$50,108.89.					
Fidelity Traditional IRA ⇒ Johnson & Johnson Common Stock (JNJ) [ST]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]		\$100,001 - \$250,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST]		\$50,001 - \$100,000	Tax-Deferred		☒
DESCRIPTION: One buy exchange of \$29,635.77.					
Fidelity Traditional IRA ⇒ Lord Abbett Short Duration High Yield Fund Class I (LSYIX) [MF]		\$100,001 - \$250,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ McDonald's Corporation Common Stock (MCD) [ST]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]		\$15,001 - \$50,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$100,001 - \$250,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ Novo Nordisk A/S Common Stock (NVO) [ST]		\$50,001 - \$100,000	Tax-Deferred		☒
DESCRIPTION: Two buy exchanges: 1. \$30,589.72 2. \$48,694.80					
Fidelity Traditional IRA ⇒ Pepsico, Inc. (PEP) [ST]		\$15,001 - \$50,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ Procter & Gamble Company (PG) [ST]		\$15,001 - \$50,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ The Hershey Company Common Stock (HSY) [ST]		\$50,001 - \$100,000	Tax-Deferred		☐

Asset	Owner	Value of Asset	Income Type(s)	Income	Tx. > \$1,000?
Fidelity Traditional IRA ⇒ Union Pacific Corporation Common Stock (UNP) [ST]		\$50,001 - \$100,000	Tax-Deferred		☒
DESCRIPTION: One buy exchange of \$50,037.90.					
Fidelity Traditional IRA ⇒ UnitedHealth Group Incorporated Common Stock (UNH) [ST]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ Visa Inc. (V) [ST]		\$50,001 - \$100,000	Tax-Deferred		☐
Fidelity Traditional IRA ⇒ Walmart Inc. - Common Stock (WMT) [ST]		\$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?
Fidelity Joint TBE ⇒ The Baldwin Insurance Group, Inc. - Class A Common Stock (BWIN) [ST]	JT	02/06/2025	S (partial)	\$15,001 - \$50,000	☒
Fidelity Joint TBE ⇒ The Baldwin Insurance Group, Inc. - Class A Common Stock (BWIN) [ST]	JT	02/07/2025	S (partial)	\$1,000,001 - \$5,000,000	☒
Fidelity Roth IRA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		02/26/2025	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Fidelity Advisor Total Bond CL Z [GS]		02/19/2025	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST]		02/18/2025	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]		01/28/2025	S	\$1,001 - \$15,000	☒
Fidelity Roth IRA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]	SP	02/26/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Roth IRA ⇒ Fidelity Advisor Total Bond CL Z [GS]	SP	02/19/2025	P	\$800.00	
Fidelity Roth IRA ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST]	SP	02/18/2025	P	\$1,001 - \$15,000	
Fidelity Traditional IRA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		02/26/2025	P	\$50,001 - \$100,000	
Fidelity Traditional IRA ⇒ Fidelity Advisor Total Bond CL Z [GS]		02/19/2025	P	\$1,001 - \$15,000	
Fidelity Traditional IRA ⇒ Lockheed Martin Corporation Common Stock (LMT) [ST]		02/18/2025	P	\$15,001 - \$50,000	
Fidelity Traditional IRA ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]		01/28/2025	S	\$50,001 - \$100,000	☒
Fidelity Traditional IRA ⇒ Novo Nordisk A/S Common Stock (NVO) [ST]		03/27/2025	P	\$15,001 - \$50,000	
Fidelity Roth IRA ⇒ Novo Nordisk A/S Common Stock (NVO) [ST]		03/27/2025	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Costco Wholesale Corporation - Common Stock (COST) [ST]	SP	01/28/2025	S	\$1,001 - \$15,000	☒
Fidelity Roth IRA ⇒ Union Pacific Corporation Common Stock (UNP) [ST]	SP	04/21/2025	P	\$1,001 - \$15,000	
Fidelity Joint TBE ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]	JT	06/16/2025	S	\$1,001 - \$15,000	☒
Fidelity Joint TBE ⇒ Apple Inc. - Common Stock (AAPL) [ST]	JT	06/16/2025	S	\$15,001 - \$50,000	☒
Fidelity Joint TBE ⇒ Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]	JT	06/16/2025	S	\$15,001 - \$50,000	☒
Fidelity Joint TBE ⇒ Cisco Systems, Inc. - Common Stock (CSCO) [ST]	JT	06/16/2025	S	\$1,001 - \$15,000	☒
Fidelity Joint TBE ⇒	JT	06/16/2025	S	\$15,001 - \$50,000	☒

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Home Depot, Inc. (HD) [ST]					
Fidelity Joint TBE ⇒ JP Morgan Chase & Co. Common Stock (JPM) [ST]	JT	06/16/2025	S	\$15,001 - \$50,000	☒
Fidelity Joint TBE ⇒ Johnson & Johnson Common Stock (JNJ) [ST]	JT	06/16/2025	S	\$15,001 - \$50,000	☒
Fidelity Joint TBE ⇒ Kenvue Inc. Common Stock (KVUE) [ST]	JT	06/16/2025	S	\$1,001 - \$15,000	☒
Fidelity Joint TBE ⇒ McDonald's Corporation Common Stock (MCD) [ST]	JT	06/16/2025	S	\$15,001 - \$50,000	☒
Fidelity Joint TBE ⇒ The Baldwin Insurance Group, Inc. - Class A Common Stock (BWIN) [ST]	JT	04/10/2025	S (partial)	\$500,001 - \$1,000,000	☒
Fidelity Traditional IRA ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]		07/22/2025	S	\$50,001 - \$100,000	☐
Fidelity Traditional IRA ⇒ Comcast Corporation - Class A Common Stock (CMCSA) [ST]		08/04/2025	S	\$15,001 - \$50,000	☐
Fidelity Traditional IRA ⇒ Novo Nordisk A/S Common Stock (NVO) [ST]		08/04/2025	P	\$15,001 - \$50,000	
Fidelity Traditional IRA ⇒ iShares Core S&P 500 ETF (IVV) [OT]		10/14/2025	P	\$50,001 - \$100,000	
LOCATION: US DESCRIPTION: IVV (iShares Core S&P 500 ETF) isn't shown as an option in the Stocks dropdown list, even though I have reported it on past PTRs and Annual FDs. I didn't see an option besides "Other" for entering it.					
Fidelity Traditional IRA ⇒ Union Pacific Corporation Common Stock (UNP) [ST]		10/14/2025	P	\$50,001 - \$100,000	
Fidelity Roth IRA ⇒ Comcast Corporation - Class A Common Stock (CMCSA) [ST]		08/04/2025	S	\$1,001 - \$15,000	☐
Fidelity Roth IRA ⇒ Novo Nordisk A/S Common Stock (NVO) [ST]		08/04/2025	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒		10/14/2025	P	\$1,001 - \$15,000	

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
iShares Core S&P 500 ETF (IVV) [OT] LOCATION: US DESCRIPTION: IVV (iShares Core S&P 500 ETF) isn't shown as an option in the Stocks dropdown list, even though I have reported it on past PTRs and Annual FDs. I didn't see an option besides "Other" for entering it.					
Fidelity Roth IRA ⇒ Union Pacific Corporation Common Stock (UNP) [ST]		10/14/2025	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]		07/22/2025	S	\$1,001 - \$15,000	☐
Fidelity Roth IRA ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]	SP	07/22/2025	S	\$1,001 - \$15,000	☐
Fidelity Roth IRA ⇒ Comcast Corporation - Class A Common Stock (CMCSA) [ST]	SP	08/04/2025	S	\$1,001 - \$15,000	☐
Fidelity Roth IRA ⇒ Novo Nordisk A/S Common Stock (NVO) [ST]	SP	08/04/2025	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ iShares Core S&P 500 ETF (IVV) [OT] LOCATION: US DESCRIPTION: IVV (iShares Core S&P 500 ETF) isn't shown as an option in the Stocks dropdown list, even though I have reported it on past PTRs and Annual FDs. I didn't see an option besides "Other" for entering it.	SP	10/14/2025	P	\$1,001 - \$15,000	
Fidelity Roth IRA ⇒ Union Pacific Corporation Common Stock (UNP) [ST]	SP	10/14/2025	P	\$1,001 - \$15,000	
Fidelity Joint TBE ⇒ Merck & Company, Inc. Common Stock (MRK) [ST]	JT	06/16/2025	S	\$1,001 - \$15,000	☒
Fidelity Joint TBE ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]	JT	06/16/2025	S	\$15,001 - \$50,000	☒
Fidelity Joint TBE ⇒ Pepsico, Inc. (PEP) [ST]	JT	06/16/2025	S	\$1,001 - \$15,000	☒
Fidelity Joint TBE ⇒ Procter & Gamble Company (PG) [ST]	JT	06/16/2025	S	\$15,001 - \$50,000	☒
Fidelity Joint TBE ⇒ United Parcel Service, Inc. Common Stock (UPS) [ST]	JT	06/16/2025	S	\$1,001 - \$15,000	☒

Asset	Owner	Date	Tx. Type	Amount	Cap. Gains > \$200?
Fidelity Joint TBE ⇒ Visa Inc. (V) [ST]	JT	06/16/2025	S	\$15,001 - \$50,000	☒
Fidelity Joint TBE ⇒ Walmart Inc. Common Stock (WMT) [ST]	JT	06/16/2025	S	\$15,001 - \$50,000	☒

* 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	\$500,001 - \$1,000,000

SCHEDULE E: POSITIONS

Position	Name of Organization
Member	U.S. Naval Academy Board of Visitors

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 granted as part of Baldwin Insurance Group's asset purchase of Lanier Upshaw, Inc. on 1/1/2020. A portion of the purchase price consisted of 389,727 shares of BWIN's Class A Common Stock (NASDAQ: BWIN) at \$15.70 per share, for a value of \$4,902,021.90 at the time of closing. 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

Trip Details					Inclusions		
Source	Start Date	End Date	Itinerary	Days at Own Exp.	Lodging?	Food?	Family?
Ripon Society	08/03/2025	08/09/2025	Tampa, Florida - Geneva, Switzerland - Tampa, Florida	2	☒	☒	☒

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 IRA-Spousal (Owner: SP) - Fidelity Roth IRA (Owner: SP) - Fidelity Traditional IRA - Fidelity Roth IRA - Fidelity Joint TBE (Owner: JT) LOCATION: US
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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. Scott Scott Franklin , 08/10/2026