



Filing ID #10077037

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Daniel John Franzese
Status: Congressional Candidate
State/District: FL25

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2026
Filing Date: 07/14/2026
Period Covered: 01/01/2025– 06/14/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
American Express Savings Account [BA]		\$15,001 - \$50,000	Interest	\$201 - \$1,000	\$1,001 - \$2,500
Chase Bank Accounts [BA]		\$15,001 - \$50,000	Interest	None	\$1 - \$200
Charles Schwab IRA Rollover 1593-2689 ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab IRA Rollover 1593-2689 ⇒ CVS Health Corporation Common Stock (CVS) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab IRA Rollover 1593-2689 ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$100,001 - \$250,000	Tax-Deferred		
Charles Schwab IRA Rollover 1593-2689 ⇒ PepsiCo, Inc. (PEP) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab IRA Rollover 1593-2689 ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$100,001 - \$250,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Charles Schwab IRA Rollover 8429-2505 ⇒ Alphabet Inc. - Class C Capital Stock (GOOG) [ST]		\$100,001 - \$250,000	Tax-Deferred		
Charles Schwab IRA Rollover 8429-2505 ⇒ Bank Sweep [IH]		\$1,001 - \$15,000	Tax-Deferred		
Charles Schwab IRA Rollover 8429-2505 ⇒ Home Depot, Inc. (HD) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab IRA Rollover 8429-2505 ⇒ M1 Bank CD [CS]		None	Interest	\$1,001 - \$2,500	\$2,501 - \$5,000
Charles Schwab IRA Rollover 8429-2505 ⇒ Morgan Stanley CD 5/14/27 [BA]		\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab IRA Rollover 8429-2505 ⇒ Morgan Stanley CD 5/17/27 [BA]		\$250,001 - \$500,000	Tax-Deferred		
Charles Schwab IRA Rollover 8429-2505 ⇒ NVIDIA Corporation - Common Stock (NVDA) [ST]		\$50,001 - \$100,000	Tax-Deferred		
Charles Schwab IRA Rollover 8429-2505 ⇒ UBS Bank USA CD 6/28/2028 [BA]		\$100,001 - \$250,000	Tax-Deferred		
Charles Schwab IRA Rollover 8429-2505 ⇒ US TSY Note 03/15/27 [GS]		\$50,001 - \$100,000	Tax-Deferred		
Charles Schwab IRA Rollover 8429-2505 ⇒ Vanguard Growth ETF (VUG) [EF]		\$100,001 - \$250,000	Tax-Deferred		
Charles Schwab IRA Rollover 8429-2505 ⇒ Vanguard Mid-Cap Growth ETF (VOT) [EF]		\$100,001 - \$250,000	Tax-Deferred		
Charles Schwab IRA Rollover 8429-2505 ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$100,001 - \$250,000	Tax-Deferred		
Charles Schwab IRA Rollover 8429-2505 ⇒ Wells Fargo Bank CD 12/07/2026 [BA]		\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab IRA Rollover 8429-2505 ⇒ Wells Fargo Bank CD 12/14/2026 [BA]		\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab Main 3825-9436 ⇒		\$15,001 - \$50,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Beal Bank USA CD 9/9/2026 [BA]					
Charles Schwab Main 3825-9436 ⇒ CASH [BA]		\$15,001 - \$50,000	Interest	\$1 - \$200	\$1 - \$200
Charles Schwab Main 3825-9436 ⇒ Charles Schwab Bank SSB CD 12/04/25 [BA]		None	Interest	None	\$201 - \$1,000
Charles Schwab Main 3825-9436 ⇒ Customers Bank CD 6/16/25 [BA]		None	Interest	None	\$1,001 - \$2,500
Charles Schwab Main 3825-9436 ⇒ Farmers & Merchants CD 2/1/2027 [BA]		None	Capital Gains, Interest	None	\$2,501 - \$5,000
Charles Schwab Main 3825-9436 ⇒ Farmers and Merchants CD 3/12/27 [CS]		None	Interest	None	\$1,001 - \$2,500
Charles Schwab Main 3825-9436 ⇒ Federal Farm Credit Bank Note 3/22/27 [GS]		None	Capital Gains, Interest	None	\$201 - \$1,000
Charles Schwab Main 3825-9436 ⇒ Federal Home Loan Bank 3% 3/12/27 [GS]		None	Capital Gains, Interest	None	\$201 - \$1,000
Charles Schwab Main 3825-9436 ⇒ Federal Home Loan Bank 4.5% Note 3/12/2027 [GS]		None	Capital Gains, Interest	None	\$2,501 - \$5,000
Charles Schwab Main 3825-9436 ⇒ Federal Home Loan Bank Note 11/17/2026 [GS]		\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Charles Schwab Main 3825-9436 ⇒ Federal Home Loan Bank Note 11/17/26 [GS]		\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Charles Schwab Main 3825-9436 ⇒ Federal Home Loan Bank Note 3/12/2027 [GS]		None	Capital Gains, Interest	None	\$201 - \$1,000
Charles Schwab Main 3825-9436 ⇒ State Bank of Texas/Dallas CD 9/30/2025 [BA]		None	Interest	None	\$1,001 - \$2,500
Charles Schwab Roth Contributory IRA 3779-2862 ⇒ Blackstone Secured Lending Fund Common Shares of Beneficial Interest (BXSL) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab Roth Contributory IRA 3779-2862 ⇒		\$100,001 -	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Energy Transfer LP Common Units (ET) [ST]		\$250,000			
Charles Schwab Roth Contributory IRA 3779-2862 ⇒ Enterprise Products Partners L.P. Common Stock (EPD) [ST]		\$100,001 - \$250,000	Tax-Deferred		
Charles Schwab Roth Contributory IRA 3779-2862 ⇒ Global X SuperDividend REIT ETF (SRET) [EF]		\$100,001 - \$250,000	Tax-Deferred		
Charles Schwab Roth Contributory IRA 3779-2862 ⇒ Golub Capital BDC, Inc. - Closed End Fund (GBDC) [ST]		\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab Roth Contributory IRA 3779-2862 ⇒ MPLX LP Common Units Representing Limited Partner Interests (MPLX) [ST]		\$100,001 - \$250,000	Tax-Deferred		
Charles Schwab Roth Contributory IRA 3779-2862 ⇒ Plains All American Pipeline, L.P. - Common Units representing Limited Partner Interests (PAA) [ST]		\$100,001 - \$250,000	Tax-Deferred		
Charles Schwab Roth Contributory IRA 3779-2862 ⇒ VanEck BDC Income ETF (BIZD) [EF]		\$15,001 - \$50,000	Tax-Deferred		
Charles Schwab Roth Contributory IRA 3779-2862 ⇒ Vanguard Growth ETF (VUG) [EF] DESCRIPTION: Roth IRA.		\$50,001 - \$100,000	Tax-Deferred		
Charles Schwab Roth Contributory IRA 3779-2862 ⇒ Vanguard S&P 500 ETF (VOO) [EF] DESCRIPTION: Roth IRA.		\$100,001 - \$250,000	Tax-Deferred		
Charles Schwab Roth Contributory IRA 3779-2862 ⇒ Verizon Communications Inc. Common Stock (VZ) [ST]		\$100,001 - \$250,000	Tax-Deferred		
DAF Giving 360 ⇒ Schwab Total Stock Market Index Fd Select Shs a Series of Schwab Capit (SWTSX) [MF] DESCRIPTION: Donor Advised Fund.		\$15,001 - \$50,000	None		
MERRILL LYNCH 22Z-54T62 ⇒ CASH [BA]		\$1 - \$1,000	None		
MERRILL LYNCH 22Z-54T62 ⇒ State Street SPDR S&P Semiconductor ETF (XSD) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$15,001 - \$50,000	\$1 - \$200

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
MERRILL LYNCH 22Z-54T62 ⇒ State Street SPDR S&P Software & Services ETF (XSW) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$1 - \$200
MERRILL LYNCH 22Z-54T62 ⇒ Vanguard Mid-Cap Growth ETF (VOT) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$1 - \$200
MERRILL LYNCH 22Z-54T62 ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	\$201 - \$1,000
MERRILL LYNCH 22Z-54T62 ⇒ Vanguard Small-Cap Value ETF (VBR) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$201 - \$1,000
MERRILL LYNCH 22Z-54T62 ⇒ Vanguard Value ETF (VTV) [EF]		\$1,001 - \$15,000	Capital Gains, Dividends	\$2,501 - \$5,000	\$201 - \$1,000
Merrill Lynch 54X-18439 ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$50,001 - \$100,000	Capital Gains	None	\$15,001 - \$50,000
Merrill Lynch 54X-18439 ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$50,001 - \$100,000
Merrill Lynch 54X-18439 ⇒ AT&T Inc. (T) [ST]		None	Dividends	None	\$1,001 - \$2,500
Merrill Lynch 54X-18439 ⇒ Bank Hapoalim BM NY CD 1/29/2027 [BA]		None	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Merrill Lynch 54X-18439 ⇒ Bank of America Corporation Common Stock (BAC) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$201 - \$1,000	\$50,001 - \$100,000
Merrill Lynch 54X-18439 ⇒ CIBC Bank USA CD 5/26/26 [BA]		None	Capital Gains, Interest	None	\$201 - \$1,000
Merrill Lynch 54X-18439 ⇒ Delta Air Lines, Inc. Common Stock (DAL) [ST]		None	Capital Gains, Dividends	\$1 - \$200	\$201 - \$1,000
Merrill Lynch 54X-18439 ⇒ Exxon Mobil Corporation Common Stock (XOM) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000
Merrill Lynch 54X-18439 ⇒ International Business Machines Corporation Common		\$100,001 - \$250,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$5,001 - \$15,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Stock (IBM) [ST]					
Merrill Lynch 54X-18439 ⇒ Keurig Dr Pepper Inc. (KDP) [ST]		None	Capital Gains, Dividends	None	\$5,001 - \$15,000
Merrill Lynch 54X-18439 ⇒ Key Bank USA CD 12/30/2025 [BA]		None	Interest	None	\$1,001 - \$2,500
Merrill Lynch 54X-18439 ⇒ McDonald's Corporation Common Stock (MCD) [ST]		\$50,001 - \$100,000	Capital Gains, Dividends	\$201 - \$1,000	\$15,001 - \$50,000
Merrill Lynch 54X-18439 ⇒ Microsoft Corporation - Common Stock (MSFT) [ST]		\$15,001 - \$50,000	Capital Gains, Dividends	\$1,001 - \$2,500	\$50,001 - \$100,000
Merrill Lynch 54X-18439 ⇒ Pepsico, Inc. (PEP) [ST]		\$50,001 - \$100,000	Dividends	\$1,001 - \$2,500	\$2,501 - \$5,000
Merrill Lynch 54X-18439 ⇒ Starbucks Corporation - Common Stock (SBUX) [ST]		None	Capital Gains, Dividends	None	\$50,001 - \$100,000
Merrill Lynch 54X-18439 ⇒ US TSY NOTE 03/15/26 [GS]		None	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
Merrill Lynch 54X-18439 ⇒ Vanguard Energy ETF (VDE) [EF]		None	Dividends	None	\$201 - \$1,000
Merrill Lynch 54X-18439 ⇒ Vanguard Growth ETF (VUG) [EF]		None	Dividends	None	\$201 - \$1,000
MERRILL LYNCH 56N-85699 ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST]		\$15,001 - \$50,000	Capital Gains	\$5,001 - \$15,000	None
MERRILL LYNCH 56N-85699 ⇒ Apple Inc. - Common Stock (AAPL) [ST]		\$15,001 - \$50,000	Dividends	\$1 - \$200	None
MERRILL LYNCH 56N-85699 ⇒ AT&T Inc. (T) [ST]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	None
MERRILL LYNCH 56N-85699 ⇒ Bank Hapoalim BM NY CD 1/29/2027 [BA]		None	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
MERRILL LYNCH 56N-85699 ⇒ Bank Hapoalim BM NY CD 3/1/27 [BA]		\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
MERRILL LYNCH 56N-85699 ⇒ Delta Air Lines, Inc. Common Stock (DAL) [ST]		\$50,001 - \$100,000	Dividends	\$201 - \$1,000	None
MERRILL LYNCH 56N-85699 ⇒ State Street SPDR S&P Semiconductor ETF (XSD) [EF]		\$50,001 - \$100,000	Dividends	\$1 - \$200	None
MERRILL LYNCH 56N-85699 ⇒ State Street SPDR S&P Software & Services ETF (XSW) [EF]		\$15,001 - \$50,000	None		
MERRILL LYNCH 56N-85699 ⇒ UBS Bank USA CD 9/4/2026 [BA]		\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
MERRILL LYNCH 56N-85699 ⇒ US TSY NOTE 02/28/2027 [GS]		\$100,001 - \$250,000	Interest	\$1,001 - \$2,500	\$1 - \$200
MERRILL LYNCH 56N-85699 ⇒ US TSY NOTE 03/15/26 [GS]		None	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
MERRILL LYNCH 56N-85699 ⇒ Vanguard Energy ETF (VDE) [EF]		\$1,001 - \$15,000	Dividends	\$1 - \$200	None
MERRILL LYNCH 56N-85699 ⇒ Vanguard Growth ETF (VUG) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	None
MERRILL LYNCH 56N-85699 ⇒ Vanguard Information Tech ETF (VGT) [EF]		\$15,001 - \$50,000	Capital Gains, Dividends	\$5,001 - \$15,000	None
MERRILL LYNCH 56N-85699 ⇒ Vanguard S&P 500 ETF (VOO) [EF]		\$50,001 - \$100,000	Capital Gains, Dividends	\$5,001 - \$15,000	None
MERRILL LYNCH 56N-85699 ⇒ Wells Fargo Bank CD 5/27/2026 [BA]		\$50,001 - \$100,000	Interest	\$1,001 - \$2,500	\$1,001 - \$2,500
NY's 529 College Savings Program ⇒ Conservative Growth Portfolio [OT]		\$15,001 - \$50,000	Tax-Deferred		
NY's 529 College Savings Program ⇒ Moderate Growth Portfolio [OT]		\$15,001 - \$50,000	Tax-Deferred		
TIAA Retirement Plan ⇒ BlackRock equity index gg [PS]		\$50,001 - \$100,000	Tax-Deferred		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
TIAA Retirement Plan ⇒ BlackRock Mid CP Equity I J [PS]		\$50,001 - \$100,000	Tax-Deferred		
TIAA Retirement Plan ⇒ BlackRock MSCI ACWI US IJ [PS]		\$100,001 - \$250,000	Tax-Deferred		
TIAA Retirement Plan ⇒ BlackRock Russell 2000 J [PS]		\$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 C: EARNED INCOME

Source	Type	Amount Current Year to Filing	Amount Preceding Year
National Bank of Canada Financial, Inc.	Deferred Compensation	N/A	\$54,602.85
TIAA Administrative Services LLC	Retirement Distribution	N/A	\$15,815.00
Charles Schwab & Co, Inc.	Distribution from IRA	N/A	\$100,000.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

Position	Name of Organization
Director	Second Amendment Constitutionlists of Florida, Inc.

SCHEDULE F: AGREEMENTS

None disclosed.

SCHEDULE J: COMPENSATION IN EXCESS OF \$5,000 PAID BY ONE SOURCE

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

Charles Schwab Roth Contributory IRA 3779-2862
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- TIAA Retirement Plan
- NY's 529 College Savings Program
LOCATION: MA
- Charles Schwab Main 3825-9436
LOCATION: US
- Charles Schwab IRA Rollover 1593-2689
- MERRILL LYNCH 22Z-54T62
- Charles Schwab IRA Rollover 8429-2505
- Merrill Lynch 54X-18439
LOCATION: US
- MERRILL LYNCH 56N-85699
- DAF Giving 360
LOCATION: US
DESCRIPTION: Donor Advised Fund

EXCLUSIONS OF SPOUSE, DEPENDENT, OR TRUST INFORMATION

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: Daniel John Franzese , 07/14/2026