



# FINANCIAL DISCLOSURE REPORT

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## FILER INFORMATION

**Name:** Allen L. Spence Jr.  
**Status:** Congressional Candidate  
**State/District:** FL17

## FILING INFORMATION

**Filing Type:** Candidate Report  
**Filing Year:** 2026  
**Filing Date:** 05/15/2026  
**Period Covered:** 01/01/2025– 04/15/2026

## SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Allen IRA ⇒ BondBloxx Bloomberg Six Month Target Duration US Treasury ETF (XHLF) [EF]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Allen IRA ⇒ GINKGO BIOWORKS HLDGS WTS (DNABW) [ST] DESCRIPTION: 100 warrants as of 4/15/26		\$1 - \$1,000	None		
Allen IRA ⇒ HOOD 90 Call Expiring 4/17/26 [OP] DESCRIPTION: 3 covered calls		\$1 - \$1,000	None		
Allen IRA ⇒ INDA 55 Put exp 1/15/27 [OP] DESCRIPTION: Long 1 put to hedge INDA 100 share position		\$1 - \$1,000	None		
Allen IRA ⇒ iShares MSCI India ETF (INDA) [EF]		\$1,001 - \$15,000	None		
Allen IRA ⇒ LCID1 1/15/27 7 Call [OP]		\$1 - \$1,000	None		

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
DESCRIPTION: 25 Calls					
Allen IRA ⇒ LCID1 12/17/26 \$7 Call [OP]		\$1 - \$1,000	None		
DESCRIPTION: 10 contracts					
Allen IRA ⇒ LCID1n 1/15/27 # Call [OP]		\$1 - \$1,000	None		
DESCRIPTION: 35 contracts					
Allen IRA ⇒ MP 40 Put Exp 1/15/27 [OP]		\$1 - \$1,000	None		
DESCRIPTION: Long 2 Puts					
Allen IRA ⇒ MSTR 1/15/27 \$500 Call [OP]		\$1,001 - \$15,000	None		
DESCRIPTION: Short 5 contracts as part of a spread position					
Allen IRA ⇒ MSTR 450 Call 1/15/27 [OP]		\$1,001 - \$15,000	None		
DESCRIPTION: 5 contracts part of a spread					
Allen IRA ⇒ Pershing Square Tontite [PS]		Undetermined	None		
DESCRIPTION: 500 units					
Allen IRA ⇒ Pershng Square SPAR Rights [OT]		Undetermined	None		
DESCRIPTION: 125 Rights					
Allen IRA ⇒ Robinhood Markets, Inc. - Class A Common Stock (HOOD) [ST]		\$15,001 - \$50,000	None		
DESCRIPTION: Long 300 shares with calls written against the position					
Allen IRA ⇒ Shift Technologies [PS]		Undetermined	None		
DESCRIPTION: 35 shares as of 4/15/26					
Allen IRA ⇒ State Street SPDR Portfolio Short Term Corporate Bond ETF (SPSB) [EF]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Allen IRA ⇒		\$1,001 - \$15,000	None		

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Strategy Inc - Class A Common Stock (MSTR) [ST] DESCRIPTION: 20 shares as of 4/15/26					
Allen IRA ⇒ XLY 110 Puts Exp 6/18/26 [OP] DESCRIPTION: Long 3 Puts on XLY		\$1 - \$1,000	None		
Allen Spence Roth IRA ⇒ GLD 80 Put exp 4/17/26 [OP] DESCRIPTION: 2 puts		\$1 - \$1,000	None		
Allen Spence Roth IRA ⇒ HOOD 80 Put exp 4/17/26 [OP] DESCRIPTION: Married put to long stock		\$1 - \$1,000	None		
Allen Spence Roth IRA ⇒ iShares Silver Trust (SLV) [EF] DESCRIPTION: Long 300 shares as of 4/15/26 with puts married		\$15,001 - \$50,000	None		
Allen Spence Roth IRA ⇒ Robinhood Markets, Inc. - Class A Common Stock (HOOD) [ST] DESCRIPTION: 100 share HOOD with call written against it		\$1,001 - \$15,000	None		
Allen Spence Roth IRA ⇒ SLV 74 Put expiring 5/15/26 [OP] DESCRIPTION: Married to long ETF position		\$1,001 - \$15,000	None		
Allen Spence CARTA Account ⇒ Alpaca DB Inc. [PS] DESCRIPTION: 55,000 shares acquired thru employee related stock options while working for the company.		\$100,001 - \$250,000	None		
Brooke Spence IRA ⇒ Amazon.com, Inc. - Common Stock (AMZN) [ST] DESCRIPTION: 40 shares AMZN	SP	\$1,001 - \$15,000	None		
Brooke Spence IRA ⇒ BlackRock Technology and Private Equity Term Trust Common Shares of Beneficial Interest (BTX) [ST] DESCRIPTION: 705.259 shares BTX	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$201 - \$1,000
Brooke Spence IRA ⇒ Meta Platforms, Inc. - Class A Common Stock (META) [ST] DESCRIPTION: 25.191 shares META	SP	\$15,001 - \$50,000	Dividends	\$1 - \$200	\$1 - \$200

<b>Asset</b>	<b>Owner</b>	<b>Value of Asset</b>	<b>Income Type(s)</b>	<b>Income Current Year to Filing</b>	<b>Income Preceding Year</b>
Brooke Spence IRA ⇒ Publix Supermarkets Inc [PS]  DESCRIPTION: Shares earned while working at Publix and vested after years.	SP	\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Brooke Spence IRA ⇒ Saba Closed-End Funds ETF (CEFS) [EF]  DESCRIPTION: 637.846 shares of CEFS	SP	\$15,001 - \$50,000	Dividends	\$201 - \$1,000	\$1,001 - \$2,500
Wyatt Spence Coverdell ESA ⇒ abrnd Asia-Pacific Income Fund, Inc. Common Stock (FAX) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$1 - \$200
Wyatt Spence Coverdell ESA ⇒ BondBloxx Bloomberg Six Month Target Duration US Treasury ETF (XHLF) [EF]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$1 - \$200
Wyatt Spence Coverdell ESA ⇒ Ginkgo Bioworks Holdings, Inc. Class A Common Stock (DNA) [ST]		\$1 - \$1,000	None		
Wyatt Spence Coverdell ESA ⇒ HOOD 30 Call 1/15/27 Exp [OP]  DESCRIPTION: Two covered calls on HOOD Position		\$1,001 - \$15,000	None		
Wyatt Spence Coverdell ESA ⇒ iShares 20+ Year Treasury Bond ETF (TLT) [EF]		\$1,001 - \$15,000	Interest	\$1 - \$200	\$201 - \$1,000
Wyatt Spence Coverdell ESA ⇒ Pershing Square Tontie [PS]  DESCRIPTION: Pershing Square Tontite		Undetermined	Dividends	None	None
Wyatt Spence Coverdell ESA ⇒ Pershing Square Tontie SPAR Rights [PS]  DESCRIPTION: 50 rights		Undetermined	None		
Wyatt Spence Coverdell ESA ⇒ PIMCO Dynamic Income Fund Common Stock (PDI) [ST]		\$1,001 - \$15,000	Dividends	\$1 - \$200	\$201 - \$1,000
Wyatt Spence Coverdell ESA ⇒ Robinhood Markets, Inc. - Class A Common Stock (HOOD) [ST]		\$1,001 - \$15,000	None		

\* 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
RQD Clearing LLC	Salary and bonus	\$99,999.97	\$195,965.65
Cheney Brothers Inc	Hourly Pay	N/A	N/A

### SCHEDULE D: LIABILITIES

Owner	Creditor	Date Incurred	Type	Amount of Liability
	Sofi Bank, NA	June 2023	Personal Loan	\$15,001 - \$50,000
	Chase Bank	April 2026	Revolving Credit Card	\$15,001 - \$50,000

### SCHEDULE E: POSITIONS

Position	Name of Organization
Assistant Scoutmaster	Scouting America Troop 433B
VP, Operations	Alpaca Securites, LLC
Director, Execution Services	RQD* Clearing LLC

### SCHEDULE F: AGREEMENTS

None disclosed.

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

Source (Name and Address)	Brief Description of Duties
RQD Clearing LLC (New York, NY, US)	2024 - Director of Execution Services
Alpaca Securities, LLC (New York, NY, US)	2024 - VP of Operations
RQD Clearing LLC (New York, NY, US)	2025 - Director, Execution Services

### SCHEDULE A INVESTMENT VEHICLE DETAILS

<ul style="list-style-type: none"><li>Allen IRA DESCRIPTION: Rollover IRA at Schwab</li><li>Allen Spence Roth IRA</li></ul>
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DESCRIPTION: Allen Spence Roth IRA at Schwab

- Wyatt Spence Coverdell ESA  
DESCRIPTION: Coverdell ESA for the benefit of my Son. Allen L Spence Jr is the adult contributing to the account and making investment decisions.
- Brooke Spence IRA (Owner: SP)  
DESCRIPTION: Brooke Spence IRA at Raymond James
- Allen Spence CARTA Account  
DESCRIPTION: Allen Spence positions in private companies on the carta platform <https://carta.com/>

## 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:** Allen L. Spence Jr., 05/15/2026