



Filing ID #10081063

FINANCIAL DISCLOSURE REPORT

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

FILER INFORMATION

Name: Jorge Martinez
Status: Congressional Candidate
State/District: FL09

FILING INFORMATION

Filing Type: Candidate Report
Filing Year: 2026
Filing Date: 06/15/2026
Period Covered: 01/01/2025– 05/22/2026

SCHEDULE A: ASSETS AND "UNEARNED" INCOME

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
Bernstein Wealth Management ⇒ Bernstein Bond Fund [OT] DESCRIPTION: Bernstein Bond Fund		\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
Bernstein Wealth Management ⇒ Bernstein Diversified Stock Fund [OT] DESCRIPTION: Bernstein Diversified Stock Fund		\$1,000,001 - \$5,000,000	Capital Gains, Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
Bernstein Wealth Management ⇒ Bernstein Government MMKT Portfolio [OT] DESCRIPTION: Bernstein Government MMKT Portfolio		\$250,001 - \$500,000	Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
Bernstein Wealth Management ⇒ Bernstein Middle Market Private Credit [OT] DESCRIPTION: Bernstein Middle Market Private Credit		\$50,001 - \$100,000	Interest	\$5,001 - \$15,000	\$5,001 - \$15,000
Bernstein Wealth Management ⇒ Bernstein Private Credit Portfolio [OT] DESCRIPTION: Bernstein Private Credit Portfolio		\$250,001 - \$500,000	Interest	\$15,001 - \$50,000	\$15,001 - \$50,000
Charles Schwab ⇒ Carnival Corporation Ltd. Common Shares		\$5,000,001 - \$25,000,000	Dividends, Options trades	\$100,001 - \$1,000,000	\$100,001 - \$1,000,000

Asset	Owner	Value of Asset	Income Type(s)	Income Current Year to Filing	Income Preceding Year
(CCL) [ST]					
Charles Schwab ⇒ Schwab Municipal Money Fund - Ultra Shares (SWOXX) [MF]		\$1,000,001 - \$5,000,000	Dividends	\$15,001 - \$50,000	\$15,001 - \$50,000
DESCRIPTION: SWOXX - Non taxable dividends					
Charles Schwab ⇒ Tesla, Inc. - Common Stock (TSLA) [ST]		\$100,001 - \$250,000	Dividends	\$15,001 - \$50,000	\$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

Source	Type	Amount Current Year to Filing	Amount Preceding Year
Withum Smith & Brown CPAs	Deferred Wages	\$117,406.00	N/A
Nona Mezz Fund II	Private Credit Lending	\$65,000.00	\$110,000.00
Withum Smith & Brown CPAs	Wages	N/A	\$465,634.00

SCHEDULE D: LIABILITIES

None disclosed.

SCHEDULE E: POSITIONS

None disclosed.

SCHEDULE F: AGREEMENTS

Date	Parties To	Terms of Agreement
December 2025	Withum Smith & Brown CPAs	Deferred compensation agreement and COBRA health insurance

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

None disclosed.

SCHEDULE A INVESTMENT VEHICLE DETAILS

- Charles Schwab - Bernstein Wealth Management
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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: Jorge Martinez , 06/15/2026