



Filing ID #20030494

PERIODIC TRANSACTION REPORT

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

FILER INFORMATION

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

TRANSACTIONS

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
	SP	Accenture plc Class A Ordinary Shares (ACN) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	SP	Air Products and Chemicals, Inc. Common Stock (APD) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	SP	Alphabet Inc. - Class C Capital Stock (GOOG) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	SP	Amgen Inc. - Common Stock (AMGN) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>

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wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.							
SP		Apple Inc. - Common Stock (AAPL) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Apple Inc. - Common Stock (AAPL) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Joint TBE COMMENTS: Our broker sold partial holdings of four different shares (WMT, SBUX, BRKB and AAPL) on 1/30/24 for a total of \$25,380.79. He failed to advise me of these transactions and I only discovered it when trying to reconcile my holdings for the 2024 financial disclosure..	S (partial)	01/30/2024	05/19/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
SP		Automatic Data Processing, Inc. - Common Stock (ADP) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of of ADP and ITW in my spouse's Roth IRA on 9/25/24. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.	P	09/25/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Joint TBE COMMENTS: Our broker sold partial holdings of four different shares (WMT, SBUX, BRKB and AAPL) on 1/30/24 for a total of \$25,380.79. He failed to advise me of these transactions and I only discovered it when trying to reconcile my holdings for the 2024 financial disclosure..	S (partial)	01/30/2024	05/19/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
SP		Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
SP		Chubb Limited Common Stock (CB) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
	COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.					
SP	Comcast Corporation - Class A Common Stock (CMCSA) [ST]	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.					
SP	Costco Wholesale Corporation - Common Stock (COST) [ST]	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.					
SP	Fidelity Advisor Total Bond CL Z (FBKWX) [AB]	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.					
SP	FIRST TR EXCHANGE-TRADED FD VI SMID RISNG ETF (SDVY) [AB]	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.					
SP	General Dynamics Corporation Common Stock (GD) [ST]	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.					
SP	Home Depot, Inc. (HD) [ST]	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>

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	<p>FILING STATUS: New</p> <p>SUBHOLDING OF: Fidelity Roth IRA</p> <p>COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.</p>					
SP	Illinois Tool Works Inc. Common Stock (ITW) [ST]	P	09/25/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	<p>FILING STATUS: New</p> <p>SUBHOLDING OF: Fidelity Roth IRA</p> <p>COMMENTS: Our broker purchased shares of ADP and ITW in my spouse's Roth IRA on 9/25/24. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.</p>					
SP	INVESCO EXCH TRADED FD TR II NASDAQ 100 ETF (QQQM) [AB]	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	<p>FILING STATUS: New</p> <p>SUBHOLDING OF: Fidelity Roth IRA</p> <p>COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.</p>					
SP	Johnson & Johnson Common Stock (JNJ) [ST]	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	<p>FILING STATUS: New</p> <p>SUBHOLDING OF: Fidelity Roth IRA</p> <p>COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.</p>					
SP	JP Morgan Chase & Co. Common Stock (JPM) [ST]	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	<p>FILING STATUS: New</p> <p>SUBHOLDING OF: Fidelity Roth IRA</p> <p>COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.</p>					
SP	Lockheed Martin Corporation Common Stock (LMT) [ST]	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	<p>FILING STATUS: New</p> <p>SUBHOLDING OF: Fidelity Roth IRA</p> <p>COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.</p>					

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SP		LORD ABBETT SHORT DURATION HIGH YLD I (LSYIX) [AB] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
SP		McDonald's Corporation Common Stock (MCD) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
SP		Merck & Company, Inc. Common Stock (MRK) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
SP		Microsoft Corporation - Common Stock (MSFT) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
SP		Pepsico, Inc. (PEP) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
SP		Procter & Gamble Company (PG) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>

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SP	Starbucks Corporation - Common Stock (SBUX) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Starbucks Corporation - Common Stock (SBUX) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Joint TBE COMMENTS: Our broker sold partial holdings of four different shares (WMT, SBUX, BRKB and AAPL) on 1/30/24 for a total of \$25,380.79. He failed to advise me of these transactions and I only discovered it when trying to reconcile my holdings for the 2024 financial disclosure..	S (partial)	01/30/2024	05/19/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
SP	The Hershey Company Common Stock (HSY) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
SP	United Parcel Service, Inc. Common Stock (UPS) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
SP	UnitedHealth Group Incorporated Common Stock (UNH) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
SP	Visa Inc. (V) [ST] FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>

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		in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.					
	SP	Walmart Inc. Common Stock (WMT) [ST]	P	08/07/2024	05/19/2025	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Fidelity Roth IRA COMMENTS: Our broker purchased shares of 29 stocks in my spouse's Roth IRA on 8/7/24 in order to rebalance the portfolio in accordance with the firm's investment strategy for accounts that size. He failed to notify me of these transactions and it wasn't discovered until I was attempting to reconcile our investment holdings for my 2024 Financial Disclosure.					
	JT	Walmart Inc. Common Stock (WMT) [ST]	S (partial)	01/30/2024	05/19/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Fidelity Joint TBE COMMENTS: Our broker sold partial holdings of four different shares (WMT, SBUX, BRKB and AAPL) on 1/30/24 for a total of \$25,380.79. He failed to advise me of these transactions and I only discovered it when trying to reconcile my holdings for the 2024 financial disclosure..					

* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

INVESTMENT VEHICLE DETAILS

- o Fidelity Joint TBE (Owner: JT)
LOCATION: US
- o Fidelity Roth IRA (Owner: SP)

COMMENTS

INITIAL PUBLIC OFFERINGS

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Periodic Transaction Report are true, complete, and correct to the best of my knowledge and belief. Further, I CERTIFY that I have disclosed all transactions as required by the STOCK Act.

Digitally Signed: Hon. Scott Scott Franklin , 07/03/2025