

RE-3 Senators and Officers Post Travel Disclosure of Travel Expenses

Date/Time Stamp

Post Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building. **This form is a public disclosure. The form and all attachments will be made publicly available.**

Certification: *In compliance with the Regulations Governing Privately Sponsored Travel, Senate Rule 35, and the Honest Leadership and Open Government Act of 2007, I certify that I accepted the following gift of privately sponsored travel:*

Private Sponsor(s):**Travel Dates:**

American Enterprise Institute

August 11-14, 2022

Name of accompanying family member (if any):**Relationship to Traveler:**

Gayle Wicker

Wife

Total Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
\$2125	\$1725	\$836	N/A

I also certify that attached to this form are all required documents for post travel disclosure, including:

- The final **Private Sponsor Travel Certification Form** with all attachments
- The final invitation
- The final approved itinerary

I certify that all trip information reflected in the attachments above accurately reflects the travel that I accepted. If there were any changes to the trip after I received approval from the Committee, the changes are described in ATTACHMENT 1.

I have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

2/13/23

Date


Signature of Senator/Officer

ATTACHMENT 1 – CHANGES FROM APPROVED PRE-TRAVEL

Note: Material changes to a trip that occur after the Committee has issued an approval letter may invalidate the Committee's approval. Please contact the Committee with any questions regarding changes to an approved trip.

Were there any changes to the pre-approved travel expenses? (Transportation, Meals, Lodging, Other)?

☐ Yes ☒ No

Expense Change	Revised Amount	Explanation

Were there any changes to the pre-approved itinerary?

☐ Yes ☒ No

Explanation:

Were there any additional changes to the pre-approved trip?

☐ Yes ☒ No

Explanation:

Jett, Jen (Wicker)

From: Luke Strange <Luke.Strange@aei.org>
Sent: Monday, April 18, 2022 4:27 PM
To: Jett, Jen (Wicker)
Cc: Kate Fugate
Subject: Speaking invitation: AEI Jackson Hole Retreat, August 11–13, 2022

Jen,
I hope all is well! I am writing to pass along a formal invitation to Senator Wicker from American Enterprise Institute President Robert Doar to the 2022 AEI Jackson Hole Retreat, this August 11-13 at the Four Seasons in Teton Village, Wyoming. I appreciate your saving the date, and I wanted to pass on some additional information.

AEI leadership, scholars, and a close circle of our top friends and supporters will gather in Jackson Hole for policy seminars and debates on the most important issues of our time. Over the course of the private, off-the-record retreat, there will be discussions about a range of economic and national security issues, and the AEI community would benefit from Senator Wicker's participation as a speaker there.

Thank you again for considering; I look forward to hearing from you and would be glad to answer any questions.

Best,

Luke



Luke Strange
Director of Government Relations
O: 202.862.7198
C: 205.601.8458
aei.org



Dear Senator Wicker,

I am writing to invite you to participate in our annual Jackson Hole Retreat, which will be held August 11–13, 2022, at the Four Seasons in Teton Village, Wyoming.

Programming will begin with an evening reception on Thursday, August 11, and conclude the evening of Saturday, August 13. This off-the-record retreat offers a unique opportunity to hear from policymakers, intellectuals, and AEI scholars about the important work they are doing to address our nation's most pressing challenges, protect our national interests, and promote a strong American future. Past retreats have featured discussions on topics such as presidential politics, foreign policy, the nature of capitalism, and the future of the conservative movement.

Space is limited, and we believe there will be significant interest in attending. **For more information on the event or details on how to confirm your registration, please contact Kate Fugate at Kate.Fugate@aei.org.**

I hope you can join us in August.

With warm regards,



Robert Doar
President
Morgridge Scholar
American Enterprise Institute

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

-
1. Sponsor(s) of the trip (please list all sponsors): American Enterprise Institute
 2. Description of the trip: Gathering for AEI scholars, supporters, national leaders, and notable intellectuals to discuss today's pressing policy issues in an off-the-record setting.
 3. Dates of travel: August 11-14, 2022
 4. Place of travel: Jackson Hole, Wyoming
 5. Name and title of Senate invitees: Sen. Roger Wicker
 6. I *certify* that the trip fits one of the following categories:
☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
- OR -
☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
 7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- AND -
☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
 8. I *certify* that:
☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
- AND -
☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

- OR -

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

- OR -

- ☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

AEI organizes the trip and plans the agenda, while AEI scholars lead panel discussions on policy issues.

AEI is responsible for all the logistical aspects of getting the Senator to and from the conference.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

AEI is a non-profit, tax-exempt, public policy research organization. The retreat seeks to encourage

frank and free-ranging conversations over a number of public policy issues important to today's world. AEI

expects the retreat to inspire ideas that expand human dignity and human potential at home and abroad.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

This is the 6th year of the Jackson Hole retreat. For 38 years, AEI has also hosted the World Forum, a

similar retreat. For each of these, AEI invites a number of public officials to join the conversation.

Members from both the House and the Senate regularly attend.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

AEI hosts around 250 public events each year, in addition to distributing other educational materials via online resources, including the AEI website and emails. These products cover a number of topics and seek to encourage the competition of ideas.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
☒ Good Faith estimate	\$2125 (\$1775 - Two Flights; One way)	\$575 per night	\$836 MAX (2 Breakfast) (2 Lunch) (2 Dinner) (3 Reception)	N/A
☐ Actual Amounts	(\$350 - Ground Transportation Round Trip)			

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation **or** b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

The trip is arranged without regard to congressional participation.

18. Reason for selecting the location of the event or trip

The hotel is in close proximity to West Coast and Midwest.

19. Name and location of hotel or other lodging facility:

Four Seasons, Jackson Hole, WY

20. Reason(s) for selecting hotel or other lodging facility:

It is the same location as the meeting location.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

The cost of meals (\$/breakfast, \$/lunch, \$/dinner, \$/reception) reflects the catering cost

charged to AEI by the hotel. Alcohol is not included. This trip was arranged without regard to congressional participation, and we verify that no special treatment was given to members in either lodging or food.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Commercial travel - economy class, ground transportation - town car service.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: 

Name and Title: Kate Fugate, Senior Strategist, Development Events

Name of Organization: American Enterprise Institute

Address: 1789 Massachusetts Ave NW, Washington, DC 20036

Telephone Number: 202.862.5884

Fax Number: N/A

E-mail Address: kate.fugate@aei.org

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM**SIGNATURE PAGE FOR ADDITIONAL SPONSOR***(to be completed by each additional sponsor)*

I hereby *certify* that the information contained on pages 1-4 of the certification form and any accompanying addenda, all submitted in connection with the August 11-14, 2022 trip
Dates of Travel (Month Day, Year)
to Jackson Hole, WY is true, complete, and correct.
Place of Travel

Signature of Travel Sponsor: Name and Title: Kate Fugate, Senior Strategist, Development EventsName of Organization: American Enterprise InstituteAddress: 1789 Massachusetts Ave NW, Washington, DC 20036Telephone Number: 202.862.5884Fax Number: N/AE-mail Address: kate.fugate@aei.org



AEI AT JACKSON HOLE

AUGUST 11–13, 2022

AGENDA

THURSDAY, AUGUST 11

All Day	Registration	Willow Room
5:30–7:30 p.m.	Opening Reception	Handle Bar

FRIDAY, AUGUST 12

7:30–8:00 a.m.	Breakfast Available	Cottonwood Terrace
8:00–8:05 a.m.	Opening Remarks Robert Doar	Cottonwood Ballroom
8:05–9:00 a.m.	Breakfast Conversation Cottonwood Ballroom <i>Our Revolutionary Legacy: The State of the American Project</i> Yuval Levin Adam J. White John Yoo The United States will celebrate its 250th birthday in a few short years. As AEI prepares for a major scholarly project marking that milestone, how should we judge the condition of the American republic? What weaknesses now threaten our ability to meet the promise of the Declaration of Independence? What strengths can we build on to address those weaknesses?	
9:15–10:15 a.m.	Morning Session I <i>Our Digital Future: Threats and Opportunities</i> Charles Phillips Shane Tews (Moderator) (Placeholder text here)	Cottonwood Ballroom
10:30–11:30 a.m.	Morning Session II <i>The Supreme Court in a Polarized Political Era</i> Bob Bauer Laurence Hirsch Silberman Adam J. White (Moderator) The Supreme Court just completed its most significant year in recent memory—overturning <i>Roe v. Wade</i> and issuing many other important decisions on the Second Amendment, religious liberty, the administrative state, and much more. Critics are challenging not just the justices’ specific decisions but the Court itself, questioning its very legitimacy and proposing major changes to its structure and powers. To discuss the Court’s place in American law and politics, join us for a conversation with one of the nation’s leading federal judges and a former White House counsel who recently co-chaired President Joe Biden’s Commission on the Supreme Court of the United States.	Cottonwood Ballroom



AEI AT JACKSON HOLE

AUGUST 11–13, 2022

AGENDA

11:45 a.m.–1:15 p.m.	Lunch Conversation <i>The Economy on the Verge: How to Return to Price Stability and Economic Prosperity</i> Robert J. Barro Sen. Phil Gramm (R-TX) Marc Sumerlin Rep. Brad Wenstrup (R-OH) Alex Brill (Moderator) Economic growth and rapid inflation have caused consumers to curtail spending and some businesses to slow production. Monetary policy is raising the cost of funds for businesses. Can a recession be avoided? This panel will discuss the economic outlook for the remainder of 2022 and 2023, both in the US and globally, and whether a fiscal response is appropriate and feasible given the increasing gridlock in Congress.	Cottonwood Terrace and Ballroom
1:30–5:00 p.m.	Break and Recreation	
1:45–2:45 p.m.	Optional Seminar <i>Understanding the Student Loan Fiasco</i> Beth Akers The White House sits poised to forgive billions of dollars of students loans through executive action. This move will have dire consequences for taxpayers and the system of higher education. In this session, we'll discuss what's likely to come from Democrats desperate to make a splash before midterms and what Republicans should do when they regain majorities in Congress.	Aspen Room
1:15–4:30 p.m.	Optional Recreation <i>Guided Hiking</i>	Four Seasons
5:30–6:30 p.m.	Reception and Predinner Remarks John Hurley (Introduction) Gov. Glenn Youngkin	Hurley Residence
7:30–9:30 p.m.	Dinner	Hurley Residence

SATURDAY, AUGUST 13

7:30–8:00 a.m.	Breakfast Available	Cottonwood Terrace
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AEI AT JACKSON HOLE

AUGUST 11–13, 2022

AGENDA

8:00–9:00 a.m.

Breakfast Conversation

Cottonwood Ballroom

To Worry or Not to Worry: Surprising Trends That Will Shape the Future

Daniel A. Cox

Scott Lincicome

Megan McArdle

Derek Thompson

Ryan Streeter (Moderator)

We are bombarded daily with headlines spelling doom, most of which are based on short-term developments and current events. But what longer-term trends paint a rosier picture? Which trends should we be thinking about more today because of their long-term consequences? Join us for a discussion with experts who have spent a lot of time thinking about the future and which long-term trends matter most today.

9:15–10:15 a.m.

Morning Session I

Cottonwood Ballroom

What Lessons Is China Learning from the War in Ukraine?

Zack Cooper

Aaron L. Friedberg

Kori Schake (Moderator)

As the West has responded to the war in Ukraine, one country that has been closely monitoring those efforts is China. Since Beijing continues to behave aggressively toward Taiwan, the US must consider how the Chinese Communist Party is interpreting our response in Ukraine. Does the message that the Biden administration claims is being projected by the West in Ukraine match the lessons that China is actually learning from the war?

10:30–11:30 a.m.

Morning Session II

Cottonwood Ballroom

Restoring Conventional Military Deterrence in the “Terrible Twenties”

Sen. Roger F. Wicker (R-MS)

Mackenzie Eaglen (Moderator)

The advantages the US military has enjoyed for decades across the spectrum of nuclear and conventional capabilities are winnowing at the exact wrong time. Would-be challengers are rapidly producing combat-capable, tech-savvy systems en masse. As evidenced by Russia’s assault on Ukraine, China’s regional aggression, and many other examples across the globe, these challengers are not afraid to leverage conventional and innovative weaponry against the cause of freedom. Congress must shore up US military capability gaps across the armed forces by making key investments to restore and rebuild conventional combat power to enhance deterrence and avoid war.



AEI AT JACKSON HOLE

AUGUST 11–13, 2022

AGENDA

11:45 a.m.–1:15 p.m.	Lunch Conversation <i>Shifting Coalitions: How Our Parties Are Evolving</i> Chris Stirewalt Ruy Teixeira America's demographics and generational makeup are changing dramatically, which will have a profound impact on the future of elections and the coalitions that both the Democratic and Republican parties have built over the years. New AEI Senior Fellow Ruy Teixeira, who recently joined AEI from the Center for American Progress, is joined by former Fox News political editor and AEI Senior Fellow Chris Stirewalt to discuss the implications of these demographic changes and what they mean for the future of American politics.	Cottonwood Terrace and Ballroom
1:30–5:30 p.m.	Break and Recreation	
1:30–2:30 p.m.	Optional Seminar <i>Insider Briefing: AEI Survey Center on American Life</i> Daniel A. Cox Generation Z, the "zoomers," has come of age at a time of heightened political animosity and division, rapid social change, and transformative communication and information technologies. Recent polling reveals that they are more liberal, less religious, and more educated than previous generations were. But they eschew traditional labels. Personal achievement and individual accomplishments rather than politics serve as critical markers of their identity. In this lecture, we'll discuss what makes this generation so unique and how it will influence American culture, religion, and politics.	Aspen Room
1:15–5:30 p.m.	Optional Recreation <i>Fly Fishing</i>	Four Seasons
6:00–7:00 p.m.	Reception	Cottonwood Terrace
7:00–9:00 p.m.	Dinner and Conversation Gov. Christopher T. Sununu Robert Doar (Moderator)	Cottonwood Ballroom

SUNDAY, AUGUST 14

7:30–10:30 a.m.	Informal Breakfast	Cottonwood Terrace and Ballroom
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CHRISTOPHER A. COONS, DELAWARE, CHAIRMAN
JAMES LANKFORD, OKLAHOMA, VICE CHAIRMAN

BRIAN SCHATZ, HAWAII
JEANNE SHAHEEN, NEW HAMPSHIRE

JAMES E. RISCH, IDAHO
DEB FISCHER, NEBRASKA

SHANNON HAMILTON KOPPLIN, CHIEF COUNSEL AND STAFF DIRECTOR
WILLIAM B. CABLE, CHIEF CLERK

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United States Senate

SELECT COMMITTEE ON ETHICS

August 5, 2022

The Honorable Roger F. Wicker
United States Senate
Washington, DC 20510

Dear Senator Wicker:

This responds to your recent correspondence requesting approval from the Select Committee on Ethics (the Committee) to accept an invitation you and your spouse received to travel to the *Annual Jackson Hole Retreat*, in Jackson Hole, Wyoming on August 11–14, 2022, sponsored by the American Enterprise Institute (AEI). Provided that you adhere to the guidance set forth below, it appears that it is permissible for you to accept necessary expenses from AEI in connection with this trip.

Background

Based on your communication with the Committee, the background in this matter is as follows.¹ AEI invited you and your spouse to travel to the *Annual Jackson Hole Retreat*, in Jackson Hole, Wyoming on August 11–14, 2022. AEI certified to the Committee that it will pay the necessary expenses² related to the travel and that it is neither a lobbyist, lobbying firm, agent of a foreign principal, or otherwise acting as a representative or agent of a foreign government. AEI has also certified that it does not retain or employ a registered lobbyist or agent of a foreign principal and that no registered lobbyist or agent of a foreign principal will accompany you at any point throughout your trip.³

Additionally, you inform the Committee that, for a personal purpose, you intend to extend your trip in Jackson Hole for less than a day before the beginning of officially related events. You must pay the cost of any additional expenses incurred as a result of extending your trip.

Discussion

Privately-sponsored travel includes any gift of travel and travel-related expenses for travel outside the Senate duty station, including transportation, lodging, food and refreshments,

¹ If this letter does not correctly recite the facts, contact the Committee immediately.

² The term “necessary expenses” has a specific definition. See *Select Committee on Ethics’ Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 8.

³ The term “any point throughout your trip” has a specific definition. See *Select Committee on Ethics’ Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 2.

and conference fees and materials, whether paid for directly, reimbursed, or provided directly, from a private individual or entity, in connection with a Member's, officer's, or employee's official Senate duties. Incorporating reforms from the Honest Leadership and Open Government Act of 2007 (HLOGA), Pub. L. 110–81 (2007), Senate Rule 35.2 permits Members, officers, and employees to accept privately-sponsored travel only with the prior written approval of the Committee.

The Committee's approval process is governed by the *Regulations and Guidelines for Privately-Sponsored Travel and Glossary of Terms* (collectively, *Travel Regulations*). The *Travel Regulations* contain detailed requirements regarding who may sponsor travel; time limits for trips; and the type and amount of expenses that can be reimbursed.

Entities that do not retain or employ a lobbyist or foreign agent and all non-profit organizations designated as tax-exempt organizations under § 501(c)(3) of the Internal Revenue Code of 1986, regardless of whether they retain or employ a lobbyist or foreign agent, may sponsor domestic trips for up to three days. The three-day limitation means three 24-hour periods, calculated from the time of arrival in the trip location to the time of departure from the trip location. For such trips, neither lobbyists nor foreign agents may accompany a Senate invitee at any point throughout the trip, other than in a *de minimis* way.⁴ This means that neither lobbyists nor foreign agents may accompany Senate invitees at any point to and from the event, at the event itself, or at the location being visited.⁵

Under Senate Rule 35, a Senator or officer who receives payment or reimbursement for necessary expenses related to fact-finding travel must disclose those expenses to the Secretary of the Senate by filing the completed *Senators and Officers Post-Travel Disclosure of Travel Expenses* (Form RE-3), along with a copy of the *Private Sponsor Travel Certification Form*, and all relevant attachments (e.g., the private sponsor's invitation and itinerary) **within 30 days of the conclusion of Privately-Sponsored Travel.**⁶

Consistent with these standards and Committee precedent, AEI's factual representations, and the guidance contained in this letter regarding extending your trip for a personal purpose, it appears that it is permissible for you to accept necessary expenses from AEI in connection with this trip, provided that the actual travel and travel-related expenses conform to the information and materials you provided, and the travel and all required documents are disclosed to the Secretary of the Senate (Office of Public Records). Necessary expenses may include travel expenses for the spouse of a Member if the Member determines that the attendance of the spouse is appropriate to assist in the representation of the Senate.

⁴ The term "*de minimis*" has a specific definition. See *Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 3.

⁵ See *Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel* at 5; see also *Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 2–3.

⁶ Trip extensions for any purpose do not extend this deadline.

Finally, Senate Rule 34 requires a Member, on his or her Financial Disclosure Report, to make an annual disclosure of the receipt of payments or reimbursements under Senate Rule 35 from a private sponsor for officially-related travel expenses where, in the aggregate, travel expenses exceed \$415 from that sponsor during a calendar year. However, if a Member, officer, or employee properly reports the receipt of necessary expenses for such travel to the Secretary of the Senate within 30 days of the travel, as discussed above, the travel expenses need not be disclosed a second time on their Financial Disclosure Report.

I hope you find this information helpful. If you have any additional questions, please do not hesitate to contact the Committee.

Sincerely,



Shannon Hamilton Kopplin
Chief Counsel and Staff Director

Enclosure: Travel Checklist