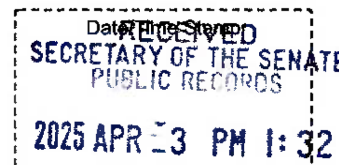


RE-2 Employee Post Travel Disclosure of Travel Expenses

Post Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the Office of Public Records in 144 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):

National Taxpayers Union Foundation

Travel Dates:

March 21, 2025 - March 22, 2025

Name of accompanying family member (if any):

N/A

Relationship to Traveler:

N/A

Total Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
79.71	\$145	76.96	N/A

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

- The final **Employee Pre-Travel Authorization** (Form RE-1)
- The final **Private Sponsor Travel Certification Form** with all attachments
- The final invitation
- The final approved itinerary

Finally, 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.

4/3/25

Date

Frank J. Fisher

Printed Name of Traveler

Frank J Fisher

Signature of Traveler

Digitally signed by Frank J Fisher
Date: 2025.04.03 12:01:02
-04'00'

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER

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.

4-3-2025

Date

Signature of Supervising 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
Transportation	79.71	Only one bus was provided, reducing cost from \$140 to \$79.71

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:

**Hyatt Regency Chesapeake Bay**

100 Heron Blvd at Route 50

Cambridge, MD 21613

Tel: 410-901-1234

Fax: 410-901-6302

INVOICE

Frank Fisher
122 C St Nw #650
Washington DC 20001
United States

Room No. 5522
Arrival 03-21-25
Departure 03-22-25
Folio Window 1
Folio No.

Confirmation No. 1936146601

Group Name National Taxpayers U

Date	Description	Charges	Credits
------	-------------	---------	---------

Total**Balance**

Guest Signature

I agree that my liability for this bill is not waived and I agree to be held personally liable in the event that the indicated person, company or association fails to pay for any part or the full amount of these charges.

WE HOPE YOU ENJOYED YOUR STAY WITH US!

Thank you for choosing the Hyatt Regency Chesapeake Bay.

In order to make our resort the best it can be, we are open to any comments that you have. Please forward your comments to: qualitychesa@hyatt.com

For any lost and found inquiries, please e-mail: lostitem@hyatt.com.

For inquiries concerning your bill, please call 888-588-6308

Please remit payment to:
Department 6017
Washington, DC 20042-3350

Resort fee inclusive of State tax

World of Hyatt Summary

Membership: XXXXXX4776

RE-1 Employee Pre-Travel Authorization

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will not be considered or approved.

Date/Time Stamp

Name of Traveler:

Frank Fisher

Employing Office/Committee:

Sen. Ron Johnson

Private Sponsor(s):

National Taxpayers Union Foundation

Destination(s):

Cambridge, MD

Travel Dates:

March 21-22, 2025

NOTE: If you plan to extend the trip for any reason you must notify the Committee.

Explain how this trip is specifically connected to the traveler's official or representational duties. Retreat will discuss various tax policy issues that I deal with regularly.

Do you have an accompanying family member or spouse on this trip? Name and Relationship to Traveler:

☐

(signify "yes" by checking box)

N/A

I certify that the information contained in this form is true, complete and correct to the best of my knowledge.

2/16/25

Frank J Fisher

Digitally signed by Frank J Fisher
Date: 2025.02.16 18:29:32 -05'00'

Date

Signature of Employee

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER

(President of the Senate, Secretary of the Senate, Sergeant at Arms,
Secretary for the Majority, Secretary for the Minority, and Chaplain)

Sen. Ron Johnson

Frank Fisher

(Print Senator's/Officer's Name)

hereby authorize

(Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate.

☐

(signify "yes" by checking box)

Date

Signature of Supervising Senator/Officer

Fisher, Frank (Ron Johnson)

From: Rachel Harden, National Taxpayers Union Foundation <events@ntu.org>
Sent: Thursday, February 13, 2025 5:00 PM
To: Fisher, Frank (Ron Johnson)
Subject: Economist Stephen Moore to Headline Tax Reform 2025 Retreat

National Taxpayers Union Foundation Event Invite

[View this email in your browser](#)

Events

National Taxpayers Union Foundation
Contact: Rachel Harden, (785) 969-2970

Stephen Moore to Speak At Tax Reform 2025 Retreat

Registration Closes Sunday



- Senior Economic Advisor to President Trump's 2016 campaign (led tax, budget, and energy policy)
- Wall Street Journal editorial board member and senior economics writer (2005–2014)
- Founder and President of the Club for Growth (1999–2004)
- Currently Senior Visiting Fellow in Economics at The Heritage Foundation

Moore will outline important principles to guide tax reform in the current economic environment. Don't miss this discussion!

Register By Sunday

1. Reserve Your Spot
2. Complete Senate Ethics Form
3. Download and Submit Primary Trip Sponsor Document

Other Confirmed Speakers

- **Erica York**, Vice President of Federal Tax Policy, Tax Foundation
- **Matt Dickerson**, Director of Budget Policy, Economic Policy Innovation Center (EPIC)
- **Andrew Lautz**, Associate Director for Economic Policy, Bipartisan Policy Center (BPC)
- **Jason Fichtner**, Senior Fellow, Bipartisan Policy Center (BPC)
- **Joshua McCabe**, Director of Social Policy, Niskanen Center
- **Alex Brill**, Senior Fellow, American Enterprise Institute (AEI)
- **Jim Hobart**, Partner, Public Opinion Strategies
- **Adam Michel**, Director of Tax Policy, Cato Institute
- **Kyle Pomerleau**, Senior Fellow, American Enterprise Institute (AEI)
- **Daniel Bunn**, President, Tax Foundation
- **Keith Hall**, Distinguished Visiting Fellow, Mercatus Center
- **Mark Rusthoven**, Policy Director, Club for Growth
- **Joe Bishop-Henchman**, Executive Vice President, National Taxpayers Union Foundation (NTUF)
- **Demian Brady**, Vice President of Research, National Taxpayers Union Foundation (NTUF)
- **Lindsey Carpenter**, Attorney, National Taxpayers Union Foundation (NTUF)

[View Full Agenda](#)

Note the updated schedule. Now departing D.C. Friday, March 21 at 7 a.m.

Returning Saturday morning March 22 about 11:30 a.m.

Registration closes this Sunday because of Senate ethics rules. Even if you're unsure you can make it, submit the Senate ethics form before the February 16 deadline.

This invite is not transferable. Please do not forward this email or share the link to the event registration form.

[Read all of NTUF's latest research](#)

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If you are not interested in receiving emails from NTU, click unsubscribe at the bottom of this message.

Our mailing address is:

122 C Street NW

Suite 700

Washington, DC 20001

[unsubscribe from this list](#) [update subscription preferences](#)



Trip Name:

Organization Information

Organization Name:

National Taxpayers Union Foundation

Is your organization classified as a §501(c)(3)?

☒ Yes ☐ No

If Yes, §501(c)(3) Organization Type:

☒ Private Foundation ☐ Public Charity

Address:

122 C Street NW, Suite 700

City, State, Zip:

Washington, D.C.

Phone Number:

703-683-5700

Organization URL:

<https://www.ntu.org/foundation>

History of Congressional Travel

Describe your organization's history of sponsoring congressional travel.

N/A

Educational Activities

Describe the educational activities performed by your organization other than sponsoring congressional travel.

National Taxpayers Union Foundation (NTUF) produces original research and analysis to show the impact that taxes, regulations, and government spending has on American taxpayers. This research is made publicly available and shared with policymakers. NTUF regularly hosts public events and discussions to inform the public of our research.

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status (Select one):

- ☐ I certify that the sponsor is not a federally registered lobbyist and does not retain or employ a federally registered lobbyist.
- ☒ I certify that the sponsor is not a federally registered lobbyist but does retain or employ one or more federally registered lobbyists.

Foreign Agent Registration Status (Select one):

- ☒ I certify that the sponsor is not an agent of a foreign principal and does not retain or employ an agent of a foreign principal.
- ☐ I certify that the sponsor is not an agent of a foreign principal but does retain or employ one or more agents of a foreign principal.

Foreign Government Involvement

Foreign Agent Registration Status (Must select all):

- ☒ I certify that the sponsor is not a foreign government.
- ☒ I certify that the sponsor is not an entity that is owned or operated by a foreign government.
- ☒ I certify that the sponsor does not receive funding from a foreign government.

Purpose and Details

Provide a brief description of the trip.

The National Taxpayers Union Foundation is sponsoring a trip for congressional staff to learn about tax policy and the expiring provisions of the Tax Cuts and Jobs Act of 2017. The purpose of this trip is to educate congressional staff about complex tax topics and their effect on American taxpayers.

Explain how the purpose of the trip relates to your organization's mission.

National Taxpayers Union Foundation provides research and analysis showing Americans how taxes, government spending, and regulations affect them. The purpose of this trip is to educate congressional staff about how tax policies under consideration would affect American taxpayers. National Taxpayers Union Foundation intends to use present the findings of our research to congressional staff to inform them of the outcomes of various tax policy scenarios.

Is your organization the only sponsor for this trip?

☒ Yes ☐ No

If No, describe your organization's role in planning the trip.

If there are multiple sponsors, each sponsor must submit Organization Information (Page 1 of the Private Sponsor Travel Certification Form) and a Signature Page Form.

Grantmaking Organizations (Optional)

If you have a Grantmaking Organization, you must attach a Grantmaking Organization Certification Form.

- 1.
- 2.
- 3.

With or Without Regard to Congressional Participation (Select one):

- ☐ The trip is arranged or organized without regard to congressional participation.
- ☒ The trip is arranged or organized with regard to congressional participation.

Lobbyist/Foreign Agent Involvement in Planning, Organizing, Requesting or Arranging

- ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal, other than de minimis involvement.

Lobbyist/Foreign Agent Financing (Must select all):

- ☒ The trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- ☒ No funds or in-kind contributions were 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.

Lobbyist/Foreign Agent Accompaniment

Complete if all sponsors are §501(c)(3) organizations (Select one):

- ☐ The trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☒ The trip is limited to 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
- ☐ The trip is limited to 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

Complete if any of the sponsors is not a §501(c)(3) organizations (Select one):

- ☐ No sponsor retains or employs a registered lobbyist or agent of a foreign principle, the trip is limited to three days (for trips inside the continental United States) or seven days (for trips outside the continental United States), and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip
- ☐ The trip is limited to 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
- ☐ The trip is limited to 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

Required if selecting the third option in either column - Please explain why the second overnight stay is practically required and necessary to accomplish the purpose of the trip.

Certification of No Recreational Activity and No Alcohol (Must select all):

- ☒ Travel expenses paid for will not include expenditures for recreational activities.
- ☒ Travel expenses paid for will not include expenditures for alcohol, except as permitted by the Regulations Governing Privately Sponsored Travel.

Invitees list

- ☒ A list of all Senate invitees is attached to this form (required).
- ☒ Members and staff from the House of Representatives will also receive invitations.

Travel Details (Submit additional pages as needed)

Trip Start Date/Time:
March 21, 2025



Trip End Date/Time:
March 22, 2025

Will the traveler be accompanied by a family member for whom the sponsor will pay travel expenses?

☐ Yes ☒ No

Transportation (Member/Officer/Employee: \$¹⁴⁰ Accompanying Family Member: \$⁰)

Transportation Type	Class	Amount
Bus	Coach	\$140

Details (optional)

National Taxpayers Union Foundation will transport attendees on a bus to the location.

Lodging (Member/Officer/Employee: \$¹⁴⁵ Accompanying Family Member: \$⁰)

Check-In	Check-Out	Facility	City	State	Country
3/21/25	3/22/25	Hyatt Regency Chesapeake Bay	Cambridge	MD	USA

Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.
1	\$145	No	

Check-In	Check-Out	Facility	City	State	Country
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Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.
--------	------------	-------------------------------	--

Check-In	Check-Out	Facility	City	State	Country
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Nights	Cost/Night	Cost Exceed Per Diem (Yes/No)	If Yes, please explain why expenses over the per diem rate are reasonable and necessary.
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Meals (Member/Officer/Employee: \$⁰\$128 Accompanying Family Member: \$_____))

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem (Y/N)
3/20/25			\$33		\$33	Cambridge	MD	USA	N
3/21/22	\$20	\$22	\$33		\$75	Cambridge	MD	USA	N
3/22/25	\$20				\$20	Cambridge	MD	USA	N

If costs exceed the federal per diem, please explain why expenses over the per diem rate are reasonable and necessary.

Reasonable Miscellaneous Expenses

(Member/Officer/Employee: \$____ Accompanying Family Member: \$_____))

Expense Type	Amount	Notes
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Additional Details (optional)

PRIVATELY SPONSORED TRAVEL

SPONSOR SIGNATURE PAGE

I hereby certify that the information submitted in connection with the trip listed below is true, complete, and correct to the best of my knowledge and belief.

Trip Name: Tax Reform 2025 Retreat
Travel Date(s): March 21, 2025 - March 22, 2025
Travel Destination(s): Cambridge, MD
Sponsor: National Taxpayers Union Foundation

Joe Bishop-Henchman

(printed name of sponsor representative)

Executive Vice President

(title)*(signature of sponsor representative)*

2/11/25

(date)

NTUF Tax Reform 2025 Retreat

Draft – Revised March 3rd

March 21-22, 2025

Hyatt Regency Chesapeake Bay

100 Heron Blvd US-50, Cambridge, MD 21613, United States

Day 1: Friday, March 21, 2025

Congressional Staff Leave DC

7:00 AM - 7:30 AM

- Bus picks up on Capitol grounds at the Peace Monument where First Street and Pennsylvania Avenue NW intersect

Travel to Cambridge, MD

7:30 AM - 10:00 AM

- Snacks / drinks to be provided

Arrival at Hyatt Regency Cambridge, MD

10:00 AM – 10:15 AM

- Baggage assistance at bus drop point outside of conference room

Welcome Breakfast & Introductory

10:15 AM - 10:45 AM

- Light breakfast buffet outside of conference room
- Joe Bishop Henchman to provide opening remarks

Tax Policy Basics

10:45 AM - 11:30 AM

- Moderator: Jason Fichtner
- Panel: Andrew Lautz, Adam Michel,
- Goal: provide theoretical grounding of tax policy (complexity, burden, benefits, etc.)

Individual Income Tax

11:30 AM - 12:30 PM

- Moderator: Demian Brady
- Panel: Josh McCabe, Patrick Fleenor, Alex Brill
- Topics requested by attendees (moderator's discretion):
 - CTC/family provisions, SALT, Pay-fors, estate tax, expiring provisions beyond FY25, fixing \$600 threshold for 1099K, tax deductible reserves, combination / simplification of existing credits/deductions

Luncheon Discussion: TCJA History

12:30 PM - 1:30 PM

- Lunch buffet outside of conference room
- Speaker: George Callas

Break

1:30 PM - 1:45 PM

Polling Presentation & Discussion

1:45 PM - 2:15 PM

- Speaker: Jarrett Lewis, Public Opinion Strategies

Scoring & Data

2:15 PM – 2:45 PM

- Moderator: Matt Dickerson
- Panelists: Keith Hall, Max Ghenis, Matt Dickerson, Demian Brady, Alex M
- Topics requested by attendees (moderator's discretion):
 - Revenue & distributional analysis, JCT scoring methodology, revenue proposals and tax reform, CBO scoring reforms

Business Tax

2:45 PM - 3:30 PM

- Moderator: Scott Hodge
- Panelists: Erica York, Mark Rusthoven, Kyle Pomerleau
- Topics requested by attendees (moderator's discretion):
 - Opportunity Zones, Corporate SALT, neutral cost recovery, energy sector / IRA tax credits, small business pass-through exemptions, operations loss rule changes made in TCJA, Deferred Acquisition Cost (DAC) tax, tax reserve basis changes made in TCJA, tax issues impacting life insurance and annuity companies, new market tax credits, reducing corporate income tax, small business, health care, 199A deduction

International Tax

3:30 PM - 4:15 PM

- Moderator: Debbie Jennings
- Panelists: Kyle Pomerleau, Daniel Bunn
- Topics requested by attendees (moderator's discretion):
 - 45x, 30d, OECD, Pillar 1/2, GILTI, FDII, international tax, reforms to GILTI and FDII, UN Tax Treaty vs Pillar 2, combatting DSTs and Pillar 1

Legislative Process & Reconciliation

4:15 PM - 5:00 PM

- Moderator: Richard Stern

- Panelists: Alex Brill, Matthew Dickerson, Adam Michel
- Items to Cover (Moderator will decide how to cover everything):
 - How House Senate differences in TCJA were resolved, etc

Attendees Check Into Hotel

5:00 PM - 5:45 PM

Policy "Small Talks": Covering Attendee-Requested & Miscellaneous Tax Policies

5:45 PM - 6:45 PM

- With Appetizers and Bar service
- Policy Areas Covered & Speaker List:
 - pull stuff from the broader policy request list to add here, maybe tariffs?

Break

6:45 PM - 7:00 PM

Fiscal Situation - dinner service (Salad Service)

7:00 PM - 7:30 PM

- Moderator: Romina Boccia
- Speakers: Keith Hall, Kurt Couchman, Richard Stern
- Topics to cover: payfors, revenue proposals, national debt

Dinner and Fireside Chat

7:30 PM - 8:30 PM

- Dinner will be served
- Speaker: Steve Moore (20 minutes)

Day 2: Saturday, March 22**Breakfast & Check Out**

8:30 AM - 9:30 AM

Depart & Travel

9:30 AM - 12:00 PM

Arrive

12:00 PM

- Bus drop off at Garfield Monument, Rayburn House Office Building

JAMES LANKFORD, OKLAHOMA, CHAIRMAN
CHRISTOPHER A. COONS, DELAWARE, VICE CHAIRMAN
JAMES E. RISCH, IDAHO
DEB FISCHER, NEBRASKA
BRAD SCHATZ, HAWAII
JEANNE SHAHEEN, NEW HAMPSHIRE
SHANNON HAMILTON KOPPLIN, CHIEF COUNSEL AND STAFF DIRECTOR
WILLIAM B. CABLE, CHIEF CLERK

HART SENATE OFFICE BUILDING, ROOM 220
SECOND AND CONSTITUTION AVENUE, NE
WASHINGTON, DC 20518-6425
TELEPHONE: (202) 224-2301
FACSIMILE: (202) 224-7116

United States Senate

SELECT COMMITTEE ON ETHICS

March 19, 2025

Frank Fisher
Office of Senator Ron Johnson
United States Senate
Washington, DC 20510

Dear Mr. Fisher:

This responds to your recent correspondence requesting approval from the Select Committee on Ethics (the Committee) to accept an invitation you received to travel to the 2025 Tax Reform Retreat in Cambridge, MD, on March 21–22, 2025, sponsored by the National Taxpayers Union Foundation (NTUF). Provided that you adhere to the guidance set forth below, it appears that it is permissible for you to accept necessary expenses from NTUF in connection with this trip.

Background

Based on your communication with the Committee, the background in this matter is as follows.¹ You are employed as an Economic Policy Advisor for the Office of Senator Ron Johnson. NTUF invited you to travel to the 2025 Tax Reform Retreat in Cambridge, MD, on March 21–22, 2025. NTUF 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. Although the National Taxpayers Union retains or employs a federally registered lobbyist or foreign agent, NTUF has certified that it is an organization designated under § 501(c)(3) of the Internal Revenue Code³ and that no registered lobbyist or agent of a foreign principal will accompany you at any point throughout your trip.⁴

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* at 10–13.

³ 26 U.S.C. § 501(c)(3).

⁴ The term “any point throughout your trip” has a specific definition. See *Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel* at 15.

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 (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.⁵ 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.⁶

Under Senate Rule 35, Senate staff must receive advance authorization signed by the Member or officer under whose direct supervision the individual works in order to accept payment or reimbursement for necessary expenses related to fact-finding travel. Further, such authorization and expenses must be disclosed to the Secretary of the Senate by filing the completed *Employee Pre-Travel Authorization* and the *Employee Post-Travel Disclosure of Travel Expenses* (Form RE-1 and Form RE-2), 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**.

Consistent with these standards and Committee precedent, NTUF's factual representations, it appears that it is permissible for you to accept necessary expenses from NTUF 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).

Finally, Senate Rule 34 requires a reporting individual,⁷ on their 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,

⁵ The term "*de minimis*" has a specific definition. See *Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel* at 6-8.

⁶ See *Select Committee on Ethics Regulations and Guidelines for Privately Sponsored Travel* at 6-10.

⁷ A reporting individual is someone whose salary equals or exceeds 120% of the basic rate of pay for GS-15 (\$150,160 for CY 2025) or is a political fund designee and is required to file financial disclosure reports.

travel expenses exceed \$480 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: Employee Privately Sponsored Travel Checklist