RE-2 Employee 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 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):

Coalition for a Prosperous America Education Fund

Travel Dates:

March 6-8, 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)
$446	$918	$553	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.

4/8/25
Date

Riley O'Leary
Printed Name of Traveler

Riley O'Leary
Signature of Traveler

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

4/8/25
Date

Steve Daines
Signature of Supervising Senator/Officer

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: CPAEF Prosperity Summit 2025

Travel Date(s): March 6 - March 8, 2025

Travel Destination(s): Ponte Vedra Beach, FL

Sponsor: Coalition for a Prosperous America Education Fund

Erika Wainwright — *(printed name of sponsor representative)*

Director of Operations — *(title)*

Erika Wainwright — *(signature of sponsor representative)*

01/17/2025 — *(date)*

0000000000871 RECEIVED BY: SECRETARY OF THE SENATE Date: April 08, 2025

2025 Prosperity Summit Agenda

MARCH 6, 2025

2:54pm - 5:02pm **Flight to Jacksonville**

Departure from Washington (DCA) at 2:54pm, arriving in Jacksonville (JAX) at 5:02pm

7:30am - 8:30am **Dinner Provided by CPAEF (Optional)**

Dinner for industry leaders will be provided separately, and there will not be any programming during this time

MARCH 7, 2025

7:30am - 8:30am **Breakfast**

Kick off the day with networking and conversation over breakfast, where attendees can connect with peers, policymakers, and industry leaders.

8:45am - 9:00am **Welcome Message**

Join CPA leadership for opening remarks, highlighting the Summit's key themes and the importance of advancing policies that strengthen America's economy and national security.

9:00am - 10:00am **Panel 1 | Tariffs: A Proven Tool for America's Economic Future**

Explore how tariffs have been instrumental in reshoring industries, creating jobs, and reducing economic dependence on adversarial nations. Panelists will discuss the impact of tariffs on U.S. manufacturing, innovation, and long-term economic resilience.

10:30am - 11:30am **Panel 2 | Securing America's Medical Supply Chain**

This panel will examine the vulnerabilities exposed during recent global crises and discuss actionable steps to reshore critical medical manufacturing. Learn how policies can ensure a reliable supply of life-saving medicines, PPE, and other essential healthcare products.

12:00pm - 1:00pm **Panel 3 | Solar Energy and Clean Technology: China's Exploitation of U.S. Tax Credits**

Delve into how Chinese firms exploit U.S. tax credits to dominate clean energy markets. Panelists will discuss the need for policies to ensure these incentives benefit domestic producers and support U.S. leadership in renewable energy.

1:00pm - 2:00pm **Networking Lunch**

Enjoy a break for a networking lunch while continuing conversations with colleagues and industry experts.

2:30pm - 3:30pm **Panel 4 | Mexico's Steel and Aluminum Surge: Impact on U.S. Industry**

Hear from industry leaders and trade experts about the surging imports of steel and aluminum from Mexico, its impact on American producers, and the urgent need to enforce trade agreements to protect U.S. industries and jobs.

4:00pm - 5:00pm **Panel 5 | China's Grip on U.S. Financial Markets**

Gain insights into how Chinese firms exploit U.S. capital markets and the risks this poses to national security. Panelists will explore legislative and regulatory solutions to address these vulnerabilities and protect American investors.

6:00pm - 7:00pm **Networking Reception**

Network with fellow attendees, speakers, and policymakers in a relaxed setting to discuss key takeaways from the day and build meaningful professional relationships.

7:00pm - 8:30pm **Dinner & Program**

Conclude the day with a formal dinner and program featuring keynote speakers who will share insights on the future of U.S. trade and industrial policy.

MARCH 8, 2025

7:03am - 9:00am **Flight to Washington, DC: Option 1**

Departure from Jacksonville (JAX) at 07:03, arriving in Washington (DCA) at 09:00

10:26am - 12:21pm **Flight to Washington, DC: Option 2**

Departure from Jacksonville (JAX) at 10:26, arriving in Washington (DCA) at 12:21

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Adam	Zipkin	adam_zipkin@booker.senate.gov	Deputy Chief of Staff	Sen. Cory Booker

Coalition for a Prosperous America Education Fund: CPAEF Prosperity Summit 2025

Organization Information

Organization Name
Coalition for a Prosperous America Education Fund

Is your organization classified as a §501(c)(3)?
☑ Yes ○ No

§501(c)(3) Organization Type
Public Charity

Address
712 H Street NE

Address 2 (Optional)
Suite 2214

City, State Zip
Washington, District Of Columbia 20002 United States

Phone Number
4138545419

Organization URL
https://prosperousamerica.org/

History of Congressional Travel

CPAEF hosted our 1st annual Prosperity Summit last year, in 2024, and included House Staffers. This year we would like to include select Senate Staffers in our invitations as well. This will be our 2nd time sponsoring congressional travel.

Educational Activities

The Coalition for a Prosperous America Education Fund hosts trade dinners and conferences bringing together our knowledge base and the lived experiences of industry experts in an educational space. We are dedicated to trade related economics and researching the impacts of historical and ongoing trade policy.

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status: *I certify that the sponsor is not a federally registered lobbyist but retain or employ one or more federally registered lobbyists.*

Foreign Agent Registration Status: *I certify that the sponsor is not an agent of a foreign principal and do not retain or employ an agent of a foreign principal.*

Foreign Government Involvement

Foreign Agent Registration Status:

- ☑ 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.

Comments

None Entered

Signature Page

The signature page is below.

Purpose and Details

Provide a brief description of the trip.

CPAEF will host a full day of high-level policy discussions with congressional staff, industry leaders, and experts to shape the future of American trade and economic policy. This exclusive winter policy retreat will feature five engaging panels, each focusing on a critical aspect of U.S. economic security. The event will include a lunch, networking reception, and a dinner featuring a keynote speaker.

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

Bringing together industry leaders and policy experts in an educational space for comfortable discussion focused on advancing industry policy is a core element of the CPA Education Fund's mission.

Is your organization the only sponsor for this trip?

- [x] Yes
- [ ] No

Grantmaking Organizations (Optional)

There are no grantmaking organizations.

With or Without Regard for Congressional Participation

The trip is arranged or organized without regard to congressional participation.

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

- [x] 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

- [x] The trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- [x] 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

- [ ] 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
- [x] 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

  > We have one full day of programming planned for March 7, 2025 from 9am to 8:30pm ET. It is not feasible to arrange same day travel before and after this agenda.

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

- [ ] 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

Certification of No Recreational Activity and No Alcohol

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

Invitees

ⓘ Members and staff from the House of Representatives **will** receive invitations.

The list of invitees is below.

Traveler Details #1 (03/06/2025 - 03/08/2025)

Trip Start Date/Time:		Trip End Date/Time:
03/06/2025 @ 02:54 PM	⇄	03/08/2025 @ 12:21 PM

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

○ Yes ● No

Itinerary

The itinerary is below.

Transportation (Per Member/Officer/Employee: $491.85 | Accompanying Family Member: $0.00)

Transportation Type	Class	Amount
Airfare	Coach	$451.85
Note Round trip		
Ground Transportation	Coach	$40.00
Note Estimated round trip ground transportation per person		

Lodging (Per Member/Officer/Employee: $918.00)

Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
03/06/2025	03/08/2025	Ponte Vedra Inn & Club	Ponte Vedra Beach	Florida	United States	2	$459.00	Yes
Cost Exceeds Per Diem Reason The rooms reserved in our room block are the most economical rooms available for these dates at the venue where we host the Prosperity Summit. All of our other guests (industry leaders and non-congressional attendees) will be paying the same fee or higher. This cost is more than we anticipated, but due to the venue's limited availability, it was the only option to accommodate our schedules.								

Meals (Per Member/Officer/Employee: $220.00)

Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
03/06/2025	$0.00	$0.00	$50.00	$0.00	**$50.00**	Ponte Vedra Beach	Florida	United States	Yes
Cost Exceeds Per Diem Reason This expense figure is an estimate. $50 is on the lower end of a standard dinner plate offered at our venue. We will be paying the same for the meals of our other guests (industry leaders and other non-congressional attendees).									
03/07/2025	$50.00	$50.00	$70.00	$0.00	**$170.00**	Ponte Vedra Beach	Florida	United States	Yes
Cost Exceeds Per Diem Reason These expense figures are an estimate. $50 is on the lower end of a standard dinner plate offered at our venue. We will be paying the same for the meals of our other guests (industry leaders and other non-congressional attendees).									

Reasonable Miscellaneous Expenses (Per Member/Officer/Employee: $0.00)

Expense Type	Amount	Notes
There are no miscellaneous expenses.		

Additional Attachments

Document Name
There are no additional attachments.

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	$45 decrease	Pre-approved expense was an estimate.
Meals	$108 increase	Pre-approved expense was an estimate. Final expense for meals were standard for industry and congressional attendees alike.

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:

0000000000885 RECEIVED BY: SECRETARY OF THE SENATE Date: April 08, 2025

2025 Prosperity Summit Agenda

MARCH 6, 2025

2:54pm - 5:02pm **Congressional Staff Flight to Jacksonville**

Departure from Washington (DCA) at 2:54pm, arriving in Jacksonville (JAX) at 5:02pm

6:30pm - 8:30pm **Dinner with Team CPA and Industry Attendees |** *Oceanfront Courtyard*

7:30pm - 8:30pm **Congressional Staff Dinner (Optional) |** *South Lawn*

Dinner for industry leaders will be provided separately, and there will not be any programming during this time.

MARCH 7, 2025

7:30am - 8:30am **Breakfast |** *Ballroom 2*

Kick off the day with networking and conversation over breakfast, where attendees can connect with peers, policymakers, and industry leaders.

8:45am - 9:00am **Welcome Message |** *Ballroom 1*

Join CPAEF leadership for opening remarks, highlighting the Summit's key themes and the importance of advancing policies that strengthen America's economy and national security.

- Zach Mottl, Chairman of CPAEF and President of Atlas Tool
- Brian O'Shaughnessy, Treasurer of CPAEF

9:00am - 10:00am **Panel 1 | Tariffs: A Proven Tool for America's Economic Future |** *Ballroom 1*

Explore how tariffs have been instrumental in reshoring industries, creating jobs, and reducing economic dependence on adversarial nations. Panelists will discuss the impact of tariffs on U.S. manufacturing, innovation, and long-term economic resilience.

- Jeff Ferry, Chief Economist Emeritus, CPAEF
- Mihir Torsekar, Senior Economist, CPAEF

10:30am - 11:30am **Panel 2 | Securing America's Medical Supply Chain |** *Ballroom 1*

This panel will examine the vulnerabilities exposed during recent global crises and discuss actionable steps to reshore critical medical manufacturing. Learn how policies can ensure a reliable supply of life-saving medicines, PPE, and other essential healthcare products.

- Aman Ahmed, Director of Government Relations and International Sales, Nexus Pharmaceuticals
- Andrew Gonce, SVP Commercial & Strategy, Mallinckrodt
- George Ball, Associate Professor, Weimer Faculty Fellow, Indiana University, Kelley School of Business
- Jessica Johnston, VP, Market Access & Payment Policy, Becton Dickinson

12:00pm - 1:00pm **Panel 3 | Solar Energy and Clean Technology: China's Exploitation of U.S. Tax Credits |** *Ballroom 1*

Delve into how Chinese firms exploit U.S. tax credits to dominate clean energy markets. Panelists will discuss the need for policies to ensure these incentives benefit domestic producers and support U.S. leadership in renewable energy.

- Mark Widmar, CEO, First Solar
- Thomas Beline, Partner, Cassidy Levy Kent
- Emily de La Bruyere, Co-Founder, Horizon Advisory
- Jeff Ferry, Chief Economist Emeritus, CPAEF

1:00pm - 2:00pm **Networking Lunch |** *Ballroom 2*

Enjoy a break for a networking lunch while continuing conversations with colleagues and industry experts.

1:30pm - 2:00pm ***Health Care Presentation |*** *Ballroom 1*

- David Light, Co-Founder and President, Valisure
- Vic Suarez, Founder & Principal Growth Partner, Blue Zone Bio

2:30pm - 3:30pm **Panel 4 | Mexico's Steel and Aluminum Surge: Impact on U.S. Industry |** *Ballroom 1*

Hear from industry leaders and trade experts about the surging imports of steel and aluminum from Mexico, its impact on American producers, and the urgent need to enforce trade agreements to protect U.S. industries and jobs.

- Steve Dillet, CEO, Custom Aluminum Products, Inc.
- Mark McClelland, CEO, Tower Extrusions
- Mickey McNamara, President, Z Modular and Executive Vice President, Zekelman Industries, Inc.
- Jeff Ferry, Chief Economist Emeritus, CPAEF
- Mihir Torsekar, Senior Economist, CPAEF

4:00pm - 5:00pm **Panel 5 | China's Grip on U.S. Financial Markets |** *Ballroom 1*

Gain insights into how Chinese firms exploit U.S. capital markets and the risks this poses to national security. Panelists will explore legislative and regulatory solutions to address these vulnerabilities and protect American investors.

- Roger Robinson Jr., former National Security Council (NSC) Senior Director of International Economic Affairs for President Ronald Reagan and former Chairman of Congressional U.S.-China Economic and Security Review Commission
- Justin Bernier, CEO, National Security Index
- Isabel Grabowski, Space Defense Industrial Base Expert, Falcon Research Inc. (SAF/SQX)
- Frederick Bailey, Director of Institutional Investor Marketing, Glancy Pronger & Murray

6:00pm - 7:00pm **Networking Reception |** *Croquet Lawn*

Network with fellow attendees, speakers, and policymakers in a relaxed setting to discuss key takeaways from the day and build meaningful professional relationships.

7:00pm - 8:30pm **Dinner & Program |** *Croquet Lawn*

Conclude the day with a formal dinner and program featuring keynote speakers who will share insights on the future of U.S. trade and industrial policy.

- David Rashid, Executive Chairman, Plews and Edelmann

- Roger Robinson, Jr., former National Security Council (NSC) Senior Director of International Economic Affairs for President Ronald Reagan and former Chairman of Congressional U.S.-China Economic and Security Review Commission

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MARCH 8, 2025

7:03am - 9:00am **Congressional Staff Flight to Washington, DC: Option 1**

Departure from Jacksonville (JAX) at 07:03, arriving in Washington (DCA) at 09:00

10:26am - 12:21pm **Congressional Staff Flight to Washington, DC: Option 2**

Departure from Jacksonville (JAX) at 10:26, arriving in Washington (DCA) at 12:21

0000000000889 RECEIVED BY: SECRETARY OF THE SENATE Date: April 08, 2025

You're invited!

COALITION FOR A PROSPEROUS AMERICA EDUCATION FUND

PROSPERITY Summit 2025

"A NEW GOLDEN ERA FOR AMERICAN MANUFACTURING"

NOTE: This event is designed to comply with U.S. House and Senate Ethics rules.

MARCH 7, 2025 | **PONTE VEDRA INN & CLUB | PONTE VEDRA BEACH, FL**

Join CPAEF for a full day of high-level policy discussions with congressional staff, industry leaders, and experts to shape the future of American trade and economic policy. This exclusive winter policy retreat will feature five engaging panels, each focusing on a critical aspect of U.S. economic security. The event will include a lunch, networking reception, and a dinner featuring a keynote speaker.

TOPICS WE'LL COVER:

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RE-1 Employee Pre-Travel Authorization

Date/Time Stamp

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.

Name of Traveler:
Riley O'Leary

Employing Office/Committee:
DAINES, STEVE

Private Sponsor(s):
Coalition for a Prosperous America Education Fund

Destination(s):
Ponte Vedra Beach, Florida

Travel Dates:
03/06/2025 to 03/08/2025
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.

The 2025 Prosperity Summit brings together policymakers, congressional staff, and industry experts to discuss issues relevant to my legislative portfolio in banking, finance, and national security. The themes discussed at the summit include: China's malign influence in U.S. capital markets and the subsequent impacts said influence has on U.S. economic security interests, and Chinese exploitation of U.S. tax credits. Attending this Summit will improve my ability to advise Senator Daines on the issues listed above.

Do you have an accompanying family member or spouse on this trip?
No

Name and Relationship to Traveler:
N/A

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

1/31/25
Date

Riley O'Leary
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)

I Senator Steve Daines hereby authorize Riley O'Leary
(Print Senator's/Officer's Name) (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)

1/31/25
Date

Steve Daines
Signature of Supervising Senator/Officer