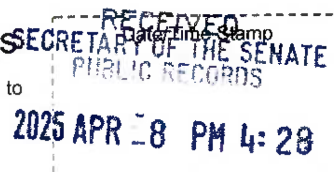


RE-2 Employee Post Travel Disclosure of Travel Expenses

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):

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.

4/8/2025

Max Summer

Date

Printed Name of Traveler

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 related expenses as defined in Rule 35.

Date

4/8/2025

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

\$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:

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:

Max Summer

Employing Office/Committee:

SPECIAL COMMITTEE ON AGING

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.

I will be listening to and engaging with stakeholders for research I am working on regarding the security of the American generic drug supply chain as well as efforts to onshore generic drug production. I am working on a report for the Committee and will also be using this research for potential future Committee Hearings. This also ties into legislation we have been working on, the American Drugs Act. We have taken a multitude of meetings on this subject and will continue to do so.

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.

2/7/2025

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)

Senator Rick Scott

(Print Senator's/Officer's Name)

hereby authorize

Max Summer

(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)

2/7/25

Date



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)

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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 Zoch, Lewis
 Thomas, Leppo
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 Samantha, Ludes
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 Nancy, Lyne
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 Kurt, Lynch
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 Legislative Assistant
 Professional Staff Member
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 Senior Policy Adviser
 Deputy Chief of Staff
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 Counselor
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 Senior Counselor
 Policy Adviser
 Senior Policy Adviser, Health Policy
 Legislative Assistant
 Legislative Assistant
 Senior Policy Adviser
 Senior Policy Adviser
 Trade and Finance Policy Adviser
 Legislative Director
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 National Security Adviser
 Senior Policy Adviser, Health Policy
 Health Policy Director
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 Legislative Aide
 Legislative Assistant
 Legislative Assistant
 National Security Adviser
 Legislative Assistant
 Deputy Legislative Director
 Legislative Assistant
 Legislative Aide
 Legislative Assistant
 General Counsel
 Legislative Assistant
 Senior Policy Adviser
 Counselor
 Legislative Aide
 Health Policy Adviser
 Legislative Assistant
 Legislative Director
 Deputy Legislative Director
 Legislative Aide
 Senior Economic Adviser
 Legislative Assistant
 Legislative Assistant
 Professional Staff Member
 Legislative Aide
 Legislative Assistant
 Health Policy Adviser
 Legislative Assistant
 Legislative Assistant
 Senior Policy Director
 Legislative Assistant
 Health Policy Adviser
 Deputy Legislative Director
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 Senior Economic Adviser
 Senior Policy Adviser, Health Policy
 Professional Staff Member
 Senior Policy Adviser, Economic Policy
 Legislative Aide
 Professional Staff Member
 Legislative Aide
 Counselor
 Legislative Assistant
 Senior Policy Adviser, Health Policy
 Professional Staff Member
 Legislative Assistant
 Policy Adviser

Sen. Jacky Rosen
 Sen. Mark Warner
 Sen. Amy Klobuchar
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 Senate Committee on Finance
 Senate Committee on Armed Services
 Sen. Daniel Sullivan
 Sen. Catherine Cortez Masto
 Sen. Roger Wicker
 Sen. Thomas Cotton
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 Sen. John Cornyn
 Sen. William Cassidy
 Sen. Richard Blumenthal
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 Sen. Michael Lee
 Sen. Virginia Manjiv
 Sen. Richard Blumenthal
 Sen. Jeffrey M. Leach
 Sen. Margaret Hassan
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 Sen. Kristen Gilliland
 Sen. Thomas H. E. Love
 Sen. Catherine Cortez Masto
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 Sen. Christopher Murphy
 Sen. Mark Warner
 Sen. Shelley Caputo
 Sen. William Hagerty
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 Sen. Cynthia Lummis
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 Sen. Josh Manly
 Sen. David Young
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 Sen. Steven James
 Sen. Steven James
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			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

§501(c)(3) Organization Type

Public Charity

Address 2 (Optional)

Suite 2214

Phone Number

4138545419

Is your organization classified as a §501(c)(3)?☒ Yes ☐ No**Address**

712 H Street NE

City, State Zip

Washington, District Of Columbia 20002 United States

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?

☒ 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

- ☒ 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

- ☒ 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

- ☐ 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

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

- ☒ 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

- ☒ 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:
03/06/2025 @ 02:54 PM



Trip End Date/Time:
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
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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
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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
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There are no miscellaneous expenses.

Additional Attachments

Document Name

There are no additional attachments.

You're invited!

COALITION FOR A PROSPEROUS AMERICA EDUCATION FUND

PROSPERITY

20 *Summit* 25

"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:

- **TARIFFS: A PROVEN TOOL FOR AMERICA'S ECONOMIC FUTURE**
- **SECURING AMERICA'S MEDICAL SUPPLY CHAIN**
- **SOLAR ENERGY & CLEAN TECH: CHINA'S EXPLOITATION OF U.S. TAX CREDITS**
- **MEXICO'S STEEL & ALUMINUM SURGE: IMPACT ON U.S. INDUSTRY**
- **CHINA'S GRIP ON U.S. FINANCIAL MARKETS**

Space is Limited!
**LEARN MORE
&
REGISTER TODAY!**

PROSPEROUSAMERICA.ORG

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 CPAEF 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
-

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

JAMES LANKFORD, OKLAHOMA, CHAIRMAN
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JEANNE SHAHEEN, NEW HAMPSHIRE

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United States Senate

SELECT COMMITTEE ON ETHICS

March 5, 2025

Max Summer
Special Committee on Aging
United States Senate
Washington, DC 20510

Dear Mr. Summer:

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 Prosperity Summit in Ponte Verda Beach, Florida, on March 6–8, 2025, sponsored by the Coalition for Prosperous America Education Fund (CPAEF). Provided that you adhere to the guidance set forth below, it appears that it is permissible for you to accept necessary expenses from CPAEF 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 a Healthcare Analyst for the Special Committee on Aging and Senator Rick Scott is your supervising Senator. CPAEF invited you to travel to the 2025 Prosperity Summit in Ponte Verda Beach, Florida, on March 6–8, 2025. CPAEF 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 Coalition for a Prosperous America retains or employs a federally registered lobbyist or foreign agent, CPAEF 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, CPAEF's factual representations, it appears that it is permissible for you to accept necessary expenses from CPAEF 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