

RE-3 Senators and Officers 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.

Date/Time Stamp
RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS
2025 MAR 26 AM 11:54

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):

AEI

Travel Dates:

03/14/2025 to 03/16/2025

Name of accompanying family member (if any):

Sharon Lee

Relationship to Traveler:

Spouse

Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
\$1,915.63	\$1,225.24	\$2,218.40	\$20,000.00

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 travel described above was in connection with my duties as an officeholder, and did not create the appearance that I was using public office for private gain.

I have made a determination that the travel described above was in connection with my duties as an officeholder, and did not create the appearance that I was using public office for private gain.

03/26/2025
 Date

MIKE LEE
 Printed Name of Traveler


 Signature of Traveler

2025 AEI World Forum

Senate Invitees:

Senator Jim Banks, Indiana

Senator John Barrasso, Wyoming

Senator Britt, Alabama

Senator Cassidy, Louisiana

Senator Susan Collins, Maine

Senator John Cornyn, Texas

Senator Tom Cotton, Arkansas

Senator Mike Crapo, Idaho

Senator Ted Cruz, Texas

Senator John Curtis, Utah

Senator Steve Daines, Montana

Senator John Fetterman, Pennsylvania

Senator Jim Justice, West Virginia

Senator John Kennedy, Louisiana

Senator James Lankford, Oklahoma

Senator Mike Lee, Utah

Senator Mitch McConnell, Kentucky

Senator David McCormick, Pennsylvania

Senator Shelley Moore Capito, West Virginia

Senator Bernie Moreno, Ohio

Senator Markwayne Mullin, Oklahoma

Senator Lisa Murkowski, Alaska

Senator Jon Ossoff, Georgia

Senator Pete Ricketts, Nebraska

Senator Eric Schmitt, Missouri

Senator Tim Sheehy, Montana

Senator Thom Tillis, North Carolina

Senator John Thune, South Dakota

Senator Roger Wicker, Mississippi

Senator Todd Young, Indiana



W O R L D F O R U M

SEA ISLAND, GEORGIA

AGENDA AND PARTICIPANTS

MARCH 13-16, 2025



2025 AGENDA

Friday, March 14

9:24-11:33 a.m.

**Senator Mike and Mrs. Sharon Lee,
Washington Reagan DCA- Jacksonville
JAX**

AA4407

11:50 a.m.-12:50 p.m.

Transfer to Sea Island

Ground transportation

2:15-3:30 p.m.

Afternoon Sessions

The Cloister

Antisemitism at the United Nations: A Global Stain

Hillel Neuer

Brett D. Schaefer

Elise Stefanik

Danielle Pletka (Moderator)

Whether it's Secretary-General António Guterres explaining away October 7 with "context," UNRWA's "mind meld" with Hamas, the International Criminal Court's unbalanced vendetta against Israel, the Human Rights Council's disturbing obsession with Israel, or the General Assembly's efforts to reward Hamas for its terrorism, the past year and a half has ripped the mask off the entire UN system's problem with Jews. Nor is this the UN's only blind spot: It was infiltrated agencywide by the Chinese Community Party and incapable of managing the COVID pandemic. The real question is: Is the United Nations redeemable?

Solving America's Housing Crisis

L. Jay Cross

Mike Flood

Eric L. Johnson

Gene Sperling

Edward L. Glaeser (Moderator)

America's housing market is deeply unbalanced, with demand growing faster than supply and home prices rising faster than many Americans' incomes. To address this, politicians typically want to subsidize homebuyers—putting additional upward pressure on prices. Increasing supply, in contrast, would put more Americans in homes while slowing the growth of prices. Supply constraints are challenging to address because they are set by localities responsive to pressure from current homeowners. But addressing them is crucial: Homeownership is central to the American Dream, wealth accumulation, and strong communities.

The US Economy in 2025: Inflation, Disruption, and Growth

Jason Furman

Jan Hatzius

Micheal R. Strain

Mark Zandi

James Pethokoukis (Moderator)

What is the state of the economy in the first quarter of 2025? Is inflation stuck above the Fed's target? Can the expansion withstand President Trump's trade and immigration policies? How big an economic boost will deregulation and tax cuts provide? Will AI spending dwarf the negative effect of policy errors? What role will heightened geopolitical tensions play? Join our panel of leading economists to discuss their outlook for 2025.

3:30-5:00 p.m.

Afternoon Break

AEI WORLD FORUM

2025 AGENDA

3:45-4:45 p.m.	Special Exhibit The Situation Room: The Wars in Ukraine and the Middle East Frederick W. Kagan Kimberly Kagan	Black Banks Parlor Frederick W. Kagan and the Critical Threats Project (CTP) at AEI work closely with their research partner, the Institute for the Study of War (ISW), led by Kimberly Kagan. CTP and ISW are analyzing the ongoing Russian invasion of Ukraine, the Israel-Hamas war, Syria, and Iran's activities in the Middle East. The daily update maps are actively used by most major media outlets, including the BBC, CNN, <i>The Guardian</i> , <i>The Financial Times</i> , <i>The New York Times</i> , and Reuters. This session will showcase the most recent CTP-ISW assessments of the conflicts in Ukraine and the Middle East and provide up-to-date information on the crises.
5:00-6:15 p.m.	Evening Conversation A Conversation with Senate Majority Leader John Thune Paul A. Gigot (Moderator)	The Cloister Ballroom After 20 years of service in the Senate, John Thune was elected to succeed Mitch McConnell as Senate majority leader. In this role, Senator Thune is leading efforts to confirm President Trump's nominees and pass Republicans' legislative agenda on issues including border security, defense spending, and tax reform. Legislative success requires appropriately weighing priorities and successfully cooperating with the House and the president. How is the Senate approaching these challenges? What is changing and what is staying the same in this era of tremendous political disruption? Join Senate Majority Leader Thune for a conversation about the political landscape and legislative dynamics facing lawmakers right now.
6:15-7:15 p.m.	Reception	The Cloister
7:15-8:30 p.m.	Dinner	The Cloister
8:30-10:15 p.m.	Post-Dinner Reception	The Cloister
8:45-9:45 p.m.	Starlight Chats A Conversation with Governor Glenn Youngkin Kristen Soltis Anderson (Moderator)	The Cloister Glenn Youngkin is entering his fourth and final year in his term-limited time as Virginia's governor in 2025. On the campaign trail and in office, Governor Youngkin has successfully navigated the challenges of winning elections and effectively governing as a Republican in a purple state, creating a healthy business environment and economic growth while pursuing an innovative and principled policy agenda on issues like education and artificial intelligence. Does Virginia point the way to a center-right agenda that can both unify conservatives and win over moderates? Join Governor Youngkin for a conversation about his experiences and the broader lessons the country can learn from his state.
	A Conversation with Phil Gramm on Free Trade, Free Markets, and Free People Michael R. Strain (Moderator)	Phil Gramm was a leader in the US Senate, serving as chairman of the Banking Committee. Since leaving Congress, he has been a leader in the public square. Most recently, Senator Gramm has been one of the strongest voices in favor of free trade. This should come as no surprise, as he has long been an important voice for free markets and free people. Join him in conversation with Michael R. Strain to discuss the importance of economic liberty, the state of politics, and Senator Gramm's life and career.

A Conversation with Vladimir Kara-Murza

Angela Stent (Moderator)

As a Pulitzer Prize-winning journalist, filmmaker, and politician, Vladimir Kara-Murza has been a leading Russian opposition figure against President Vladimir Putin for more than two decades. In 2022, he was arrested and imprisoned for publicly criticizing the invasion of Ukraine, and in 2024 he was freed in a multilateral prisoner exchange. Since his release, he has worked to promote Russian freedom, support Ukrainian resistance, and isolate Putin internationally. Join Mr. Kara-Murza and Russian foreign policy expert Angela Stent for a conversation about his experiences, the nature of Putin's regime, and Russia's future.

Saturday, March 15

7:30–9:30 a.m.

Breakfast Available

The Cloister

8:00–9:00 a.m.

Early Bird Sessions

The Cloister

A Conversation on the Future of the Press

Chris Best

AG Sulzberger

Chris Stirewalt (Moderator)

The news media is being disrupted by new technology. Many media leaders also worry about disruption from politics. How will long-standing institutions evolve, and how are new media companies reimagining journalism? Are First Amendment press freedoms safe? Join AG Sulzberger, publisher of *The New York Times*, and Chris Best, the cofounder and CEO of Substack, for a conversation on journalism.

A Conversation with University Presidents

James P. Clements

Ronald Daniels

Daniel Diermeier

Benjamin Storey (Moderator)

From battles over free expression and affirmative action to an explosion of antisemitism, campus controversies have been rampant in recent years. But not all elite universities are alike. How do academic leaders who perceive the problem with campus politicization seek to address it and preserve the academic ethos? The presidents of Clemson University, Johns Hopkins University, and Vanderbilt University join AEI's Benjamin Storey for a conversation about the future of the academy.

8:00–10:30 a.m.

Special Exhibit

Black Banks Parlor

The Situation Room: The Wars in Ukraine and the Middle East

Frederick W. Kagan

Kimberly Kagan

Frederick W. Kagan and the Critical Threats Project (CTP) at AEI work closely with their research partner, the Institute for the Study of War (ISW), led by Kimberly Kagan. CTP and ISW are analyzing the ongoing Russian invasion of Ukraine, the Israel-Hamas war, Syria, and Iran's activities in the Middle East. The daily update maps are actively used by most major media outlets, including the BBC, CNN, *The Guardian*, *The Financial Times*, *The New York Times*, and Reuters. This session will showcase the most recent CTP-ISW assessments of the conflicts in Ukraine and the Middle East and provide up-to-date information on the crises.

9:30–10:30 a.m.

Breakout Sessions

The Cloister

"Drill, Baby, Drill": Energy Markets in the Age of Trump and AI

Greg Brockman

Chris Miller

Marc Sumerlin

Daniel Yergin

Roger Pielke Jr. (Moderator)

In his inaugural address, President Trump promised to declare a national energy emergency to increase domestic energy production, saying, "We will drill, baby, drill." Simultaneously, the likely energy demands of AI technology have increased interest in energy production from a variety of sources, including some that were recently taboo, such as nuclear power. What is the future of energy technology and production? How will markets respond?

Tax Reform: Here We Go Again

Buddy Carter
 Bill Cassidy
 John Cornyn
 Brian Deese
 R. Glenn Hubbard
 Thomas Suozzi
 Alex Brill (Moderator)

In 2017, Republicans in Congress and President Trump enacted historic tax reform, reducing the corporate tax rate and temporarily cutting household taxes. Those temporary cuts expire at the end of this year, and extending them is a top priority for the second Trump administration and congressional Republicans. But how? Will Congress roll back the 2017 cap on the state and local tax deduction? Will the corporate rate come down further? Will any households see their taxes increase? What about Trump's promise to eliminate the tax on tips? And how will Congress avoid blowing out the deficit? Join our panel of experts and members of Congress to find out what changes are on the horizon.

What Does the Life of Zhou Enlai Teach Us About China Today?

Chen Jian
 Audrey Wong (Moderator)

From the Chinese Communist Party's (CCP) revolutionary roots to China's growing global engagement, Zhou Enlai played a central role as architect and executor of Chairman Mao Zedong's domestic and foreign policies. He has been exalted as a consummate statesman but also criticized for his self-preserving loyalty to Mao despite the latter's disastrous and violent excesses. In an impressive new biography, *Chen Jian*, a leading historian of the Cold War and China's foreign policy, investigates the origins and legacies of a crucial figure in modern Chinese history. Join us to discuss how Zhou's aspirations and paradoxes illuminate the CCP's trajectory and China's contemporary transformation into a global power.

10:45 a.m.–12:15 p.m. Morning Conversations
How to Best Educate Children

10:45–11:30 a.m.
 Robert Doar (Moderator)

The Cloister Ballroom

A Conversation with Eva Moskowitz

Success Academy Charter Schools in New York City is one of the most successful school systems in the country. Founded in 2006 with just one school serving 165 kindergarteners and first graders, it has grown to over 57 schools serving over 22,000 students. On test scores, graduation rates, college admissions, and other metrics, its students—many of whom are minorities or from single-parent families—are high achievers. As Success Academy's founder and CEO since day one, Eva Moskowitz has been the driving force behind these accomplishments. Join her and AEI President Robert Doar for a conversation about how she does it and what lessons American schools can learn from Success Academy.

11:30 a.m.–12:15 p.m.
 Yuval Levin (Moderator)

A Conversation with Jonathan Haidt

Jonathan Haidt has become America's leading advocate for replacing the "phone-based childhood" by recovering the "play-based childhood." What's at stake in the war over screens and social media in children's lives? What's the role of public policy, and education and culture, in advancing this agenda? And what is the evidence behind his concerns? Dr. Haidt joins AEI's Yuval Levin for a conversation about the future of childhood in America.

AEI WORLD FORUM

2025 AGENDA

12:30–2:00 p.m.

Luncheon

A Conversation with Alex Karp

Joe Lonsdale (Moderator)

The Beach Club

Alex Karp has grown Palantir into a world-class software company by applying cutting-edge innovation to advance national security and competing against market incumbents and an ossified federal procurement bureaucracy. How can the Trump administration and Congress clear obstacles to American innovation and encourage the renaissance in hardware and software development for national security that a world full of dangers will require? Join Dr. Karp, Palantir co-founder and CEO, and Joe Lonsdale, Palantir co-founder and 8VC Managing Partner, for a one-on-one conversation on this urgent challenge facing America and the West.

2:15–3:30 p.m.

Afternoon Sessions

Fixing the Crumbling Foundations of America's Military

Mackenzie Eaglen

Jimmy Panetta

Austin Scott

Raj M. Shah

Heather Wilson

Kori Schake (Moderator)

The Cloister

America has typically avoided war to achieve political objectives. Once underway, our citizenry demands no fair fight. But the portion of the defense budget that yields combat power to deter mercantilist China and revisionist Russia has collapsed, and innovation in the armed forces is completely stalled. Great ideas from tech or venture capital companies are almost never fielded at scale. Cultural resistance in the bureaucracy keeps defense primes on autopilot. The defense industrial base must be strengthened and broadened so military investments can better bolster combat forces and restore deterrence in a fiscally responsible way. Is America up to the task?

How Will Artificial Intelligence Change the World?

Greg Brockman

Erik Brynjolfsson

Scott Gottlieb

Connor Zwick

John Bailey (Moderator)

AI has captured the imaginations of scholars, business leaders, and government officials. The year 2023 will be remembered as a turning point in history—the year when humans and machines could converse in natural language and chatbots passed the Turing test. Since then, investors have poured huge sums into AI infrastructure. But beyond impressive chatbots, how specifically will AI change the world? Join this panel of scholars and technology leaders to learn about current and potential ways to apply AI to education, language acquisition, drug development, medical care, and more.

Israel and the Middle East

Elliott Abrams

Eyal Hulata

Walter Russell Mead

Danielle Pletka (Moderator)

After the devastating attacks of October 7, Israel has upended the entire region. Iran and its terrorist proxies, Lebanon, and Syria are shadows of their former selves. Iran has never been so weak. Can Israel capitalize on this moment to forge a new era? Can President Trump pull off another Abraham Accords-style miracle? Or, as the Hamas war winds to a close, will it be back to the future, with Hamas again in charge of Gaza, Hezbollah in charge of Lebanon, and Iran in possession of a nuclear weapon?

3:30–5:00 p.m.

Afternoon Break

3:45–4:45 p.m.

Special Exhibit

Black Banks Parlor

The Situation Room: The Wars in Ukraine and the Middle East

Frederick W. Kagan

Kimberly Kagan

Frederick W. Kagan and the Critical Threats Project (CTP) at AEI work closely with their research partner, the Institute for the Study of War (ISW), led by Kimberly Kagan. CTP and ISW are analyzing the ongoing Russian invasion of Ukraine, the Israel-Hamas war, Syria, and Iran's activities in the Middle East. The daily update maps are actively used by most major media outlets, including the BBC, CNN, *The Guardian*, *The Financial Times*, *The New York Times*, and Reuters. This session will showcase the most recent CTP-ISW assessments of the conflicts in Ukraine and the Middle East and provide up-to-date information on the crises.

AEI WORLD FORUM

2025 AGENDA

5:00–6:00 p.m.	Evening Conversation A Conversation with US Secretary of the Interior Doug Burgum Robert Doar (Moderator)	The Cloister Ballroom At the center of President Donald Trump's economic vision is an ambitious agenda for energy dominance: empowering domestic energy production with innovation and deregulation to lower prices, strengthen economic growth, and bolster national security. As the chief federal official in charge of public lands and natural resources, newly-confirmed Secretary of the Interior Doug Burgum is leading these efforts, building on his experience in the private sector and as Governor of North Dakota. Join Secretary Burgum for a conversation with AEI President Robert Doar about his vision for the Department of the Interior and the administration's broader priorities for industry and the private sector.
5:00 p.m.	Shuttle Departs for Mass* *Mass will begin at 5:30 p.m. at St. William Catholic Church. Shuttles will return to the Cloister at 6:45 p.m.	The Cloister
6:00–7:00 p.m.	Reception	The Cloister
7:15–8:30 p.m.	Dinner	The Cloister
8:30–10:30 p.m.	Post-Dinner Reception	The Cloister
8:45–9:45 p.m.	Starlight Chats A Conversation with Masih Alinejad Kori Schake (Moderator)	The Cloister Masih Alinejad is one of the most important voices for women's rights and human rights in Iran today. Born and raised in the country, she started her career as a political journalist and columnist, exposing corruption and challenging the Islamic Republic's leaders until she was forced into exile after the disputed 2009 presidential election. Living in America, she has continued to document the regime's abuses and challenge discrimination against women through civil disobedience campaigns, work that has made her the target of kidnapping and assassination attempts. Join her and AEI's Kori Schake for a conversation about Ms. Alinejad's work and the past, present, and future of Iran's regime.
	A Conversation with Paul Finebaum Chris Christie (Moderator)	At a time when college sports are undergoing a sea change, Paul Finebaum has become one of the most prominent sports media voices in the country. Starting his career as a sportswriter in Alabama, Mr. Finebaum has had a front-row seat as a radio host and ESPN television personality to the transformative effects of trends like conference realignment, financial compensation for athletes, sports gambling, and increasingly pervasive media coverage on college athletics. As the pace of these changes shows little sign of slowing, join him for a wide-ranging conversation on the future of college sports and sports media and their changing place in American life.
	Why Can't We Run Government Like a Bolivian Chinchilla Ranch? Jonah Goldberg	Jonah Goldberg reflects on the perils of bad analogies on all sides of our politics.



2025 AGENDA

Sunday, March 16

7:30–10:15 a.m.	Breakfast Available	The Cloister
7:30 a.m.	Shuttle Departs for Mass* *Mass will begin at 8:00 a.m. at St. William Catholic Church. Shuttles will return to the Cloister at 9:15 a.m.	The Cloister
9:00–10:15 a.m.	Early Bird Sessions A Conversation with Allen Carl Guelzo Ben Sasse (Moderator)	The Cloister The Civil War never loses its resonance. In every generation, in light of new challenges, reflecting on our greatest national crisis offers us fresh ways to think about American ideals and the nature of statesmanship. Join Allen Carl Guelzo (our greatest living Civil War historian) and Senator Ben Sasse (himself a historian and a political and educational leader) for a conversation about the meaning of that era and the importance of teaching and learning history in 21st-century America.
	Congress in a New Era Shelley Moore Capito Mike Lee Marc A. Thiessen (Moderator)	Our politics tends to focus on the presidency, but durable policy change must happen in Congress. With the narrowest House majority in generations and a closely divided Senate, how do members now think about advancing their agendas? How do they regard the president's assertions of power? And what are the prospects for progress on the country's long-term challenges?
10:30 a.m.	Senator Mike and Mrs. Sharon Lee Depart Sea Island	Ground transportation
1:30–3:20 p.m.	Senator Mike and Mrs. Sharon Lee, Jacksonville- Washington Reagan DCA	AA3175

SPEAKERS

The Honorable Elliott Abrams	Council on Foreign Relations, President of the Ethics and Public Policy Center
Masih Alinejad	World Liberty Congress, President
Kristen Soltis Anderson	Echelon Insights, Founding Partner
Rick Atkinson	Author
Doug Burgum	US Secretary of the Interior
Chris Best	Substack, Co-Founder & CEO
Greg Brockman	OpenAI, Co-Founder and President
Erik Brynjolfsson	Stanford University, Jerry Yang and Akiko Yamazaki Professor and Senior Fellow at the Stanford Institute for Human-Centered AI (HAI)
Shelley Moore Capito	US Senate (R-WV)
Buddy Carter	US House of Representatives (R-GA)
Bill Cassidy	US Senate (R-LA)
Priscilla Chan	Chan Zuckerberg Initiative, Cofounder and Co-CEO
Chen Jian	NYU, Distinguished Global Network Professor of History, NYU Shanghai Director of the Center on Global History, Economy, and Culture
James P. Clements	Clemson University, 15th President
John Cornyn	US Senate (R-TX)
L. Jay Cross	Howard Hughes Holdings, President
H. Lawrence Culp Jr.	GE Aerospace, Chairman & CEO
Ronald Daniels	Johns Hopkins University, 14th President
Brian Deese	Massachusetts Institute of Technology, Innovation Fellow
Daniel Diermeier	Vanderbilt University, Ninth Chancellor
Paul Finebaum	The Paul Finebaum Show, Host on the SEC Network
Mike Flood	US House of Representatives (R-NE)
Jason Furman	Harvard University, The Aetna Professor of the Practice of Economic Policy
Mike Gallagher	Former Congressman (R-WI)
Paul A. Gigot	<i>The Wall Street Journal</i> , Editor of the Editorial Page & Vice President
Allen Carl Guelzo	Princeton University, Thomas W. Smith Distinguished Research Scholar in the James Madison Program in American Ideals and Institutions
Jonathan Haidt	New York University Stern School of Business, Social Psychologist
Jan Hatzius	Goldman Sachs, Chief Economist & Head of Global Investment Research
Eyal Hulata	Foundation for the Defense of Democracies, Senior International Fellow & Former Israeli NSA
Eric L. Johnson	Mayor of Dallas
Kimberly Kagan	Institute for the Study of War, Founder and President
Vladimir Kara-Murza	Free Russia Foundation, Boris Nemtsov Foundation for Freedom, Founding Chairman
Alex Karp	Palantir Technologies, Co-Founder & CEO
Brian P. Kemp	Governor of Georgia
Ned Lamont	Governor of Connecticut
Mike Lee	US Senate (R-UT)
Joe Lonsdale	8VC, Founder and Managing Partner
Judy Marks	Otis Worldwide Corporation, Chair, CEO, and President
Rich McCormick	US House of Representatives (R-GA)
Walter Russell Mead	Hudson Institute, The Ravenel B. Curry III Distinguished Fellow in Strategy and Statesmanship
John Moolenaar	US House of Representatives (R-MI)
Eva Moskowitz	Success Academy Charter Schools, Founder and CEO
Paul M. Nakasone	Vanderbilt University Institute of National Security, Founding Director
Hillel Neuer	United Nations Watch, Executive Director

Jimmy Panetta	US House of Representatives (D-CA)
Karl Rove	Rove and Company, President
David M. Rubenstein	The Carlyle Group, Cofounder and Co-chairman
Ben Sasse	Former US Senator (R-NE), University of Florida, 13 th President
Austin Scott	US House of Representatives (R-GA)
Jason Smith	US House of Representatives (R-MO)
Gene Sperling	Former Director, National Economic Council
Elise Stefanik	US House of Representatives (R-NY)
Angela Stent	Georgetown University, Senior Adviser to the Center for Eurasian, Russian and East European Studies and Professor Emerita of Government and Foreign service
Kevin Stitt	Governor of Oklahoma
AG Sulzberger	<i>The New York Times</i> , Chairman and Publisher
Marc Sumerlin	Evenflow Macro, Managing Partner
Thomas Suozzi	US House of Representatives (D-NY)
John Thune	US Senate (R-SD)
Brandon Wales	SentinelOne, Vice President for Cybersecurity Strategy
Yaqiu (rachel) Wang	Freedom House, Director for China Research
Heather Wilson	University of Texas at El Paso, President
Daniel Yergin	S&P Global, Vice Chairman
Mark Zandi	Moody's Analytics, Chief Economist
Connor Zwick	Speak, Founder & CEO

AEI SCHOLARS AND MANAGEMENT

Stephanie Adler	Senior Major Gifts Officer
John Bailey	Nonresident Senior Fellow
Jason Bertsch	Executive Vice President
Alex Brill	Senior Fellow
Matthew Continetti	Senior Fellow; Patrick and Charlene Neal Chair in American Prosperity; Director, Domestic Policy Studies
Zack Cooper	Senior Fellow
Daniel A. Cox	Senior Fellow; Director, Survey Center on American Life
John Cusey	Senior Vice President for External Relations
Robert Doar	President
Mackenzie Eaglen	Senior Fellow
Nicholas Eberstadt	Henry Wendt Chair in Political Economy
Edward Glaeser	Nonresident Senior Fellow
Jonah Goldberg	Senior Fellow; Asness Chair in Applied Liberty
Jack Landman Goldsmith	Nonresident Senior Fellow
Rebecca Good	Managing Director, Outreach
Scott Gottlieb	Senior Fellow
Phil Gramm	Nonresident Senior Fellow
Christopher Grozev	Senior Director, Individual Giving
R. Glenn Hubbard	Nonresident Senior Fellow
Frederick W. Kagan	Senior Fellow; Director, Critical Threats Project
Klon Kitchen	Nonresident Senior Fellow
Yuval Levin	Senior Fellow; Beth and Ravenel Curry Chair in Public Policy; Director, Social, Cultural, and Constitutional Studies; Editor in Chief, <i>National Affairs</i>
Leigh McAfee	Vice President of Development
Sean McGilley	Senior Director, Corporate Relations
Chris Miller	Nonresident Senior Fellow

Charles Murray	F. A. Hayek Chair Emeritus in Cultural Studies
Adam Novak	Senior Major Gifts Officer
James Pethokoukis	Senior Fellow; Editor, <i>AEIdeas</i> ; DeWitt Wallace Chair
Roger Pielke Jr.	Senior Fellow
Danielle Pletka	Distinguished Senior Fellow
Ramesh Ponnuru	Nonresident Senior Fellow
Rob Portman	Distinguished Visiting Fellow in the Practice of Public Policy
Jeffrey A. Rosen	Nonresident Senior Fellow
Ian Rowe	Senior Fellow
Brett D. Schaefer	Senior Fellow
Kori Schake	Senior Fellow; Director, Foreign and Defense Policy Studies
Derek Scissors	Senior Fellow
Chris Stirewalt	Senior Fellow
Benjamin Storey	Senior Fellow
Jenna Silber Storey	Senior Fellow
Michael R. Strain	Senior Fellow; Arthur F. Burns Scholar in Political Economy; Director, Economic Policy Studies
Luke Strange	Vice President of Government Relations
Shane Tews	Nonresident Senior Fellow
Marc A. Thiessen	Senior Fellow
Adam J. White	Senior Fellow; Laurence H. Silberman Chair in Constitutional Governance
Audrye Wong	Jeane Kirkpatrick Fellow

From: Luke Strange <Luke.Strange@aei.org>
Sent: Tuesday, December 3, 2024 4:22 PM
To: shelby_johnson@lee.senate.gov
Cc: Chris Gavin <chris.gavin@AEI.org>
Subject: Speaking invitation: AEI World Forum, March 13-16, 2025

Shelby,

I am pleased to share an invitation from AEI President Robert Doar to Senator Lee to the 2025 AEI World Forum, being held this March 13-16 in Sea Island, Georgia.

Each year, AEI convenes more than 250 US and world leaders, heads of major American companies, thinkers in a wide range of fields, and our closest circle of supporters for a private, principals-only Forum on the most pressing issues facing the United States and the world. We're inviting your boss because we believe he would provide a tremendously valuable perspective for other participants in the Forum as a speaker on one of the panels being assembled by the heads of AEI's research departments. The conversations are frank, wide-ranging and benefit tremendously from the sophisticated engagement your boss has shown on energy and innovation issues. He will be among friends and Senate colleagues, and the attached invitation packet includes this year's agenda and participants list to give you an idea of what to expect.

If Senator Lee is able to attend again this year, Chris Gavin on my team (cc'd here) can answer questions about travel and lodging, and I'm glad to begin a conversation with you about the Senator's speaking role. Please let me know if you have any questions, and thank you for considering!

Best,

Luke



Luke Strange
Vice President, Government Relations
P: 202.862.7198 C: 205.601.8458
aei.org | [@aei](https://twitter.com/aei)

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	\$264.46	Revised roundtrip ground transportation costs for Senator and Mrs. Sharon Lee, from Jacksonville Airport- Sea Island on March 14 and then Sea Island-Brunswick Airport on March 16. The Senator and Mrs. Lee shared their inbound car from JAX-Sea Island with Senator and Mr. Capito, lowering the costs.
Transportation	\$1,980.64	Revised coach-class airfare for Senator Mike Lee on March 14 due to Senate votes, from DCA-JAX and then returning to Utah on March 16 from Brunswick Airport to Salt Lake City.
Transportation	\$1,915.63	Revised coach-class airfare for Mrs. Sharon Lee on March 14 due to Senate votes, from DCA-JAX and then returning to Utah on March 16 from Brunswick Airport to Salt Lake City.
Lodging	\$1,225.24	Total lodging amount for Senator and Mrs. Lee from March 14-16. The nightly rate of \$612.62 was slightly lower than the initial rate given to the Committee based on room-type availability when the Lees checked in to Sea Island.

Were there any changes to the pre-approved itinerary?

☒ Yes ☐ No

Explanation: Due to Senate votes, Senator Lee and Mrs. Sharon Lee travelled from Washington Reagan DCA-Jacksonville from 8:59pm-11:09pm on March 14, versus their originally scheduled 9:24-11:33am DCA-JAX flight on March 14. As a result, they missed all morning, afternoon, and evening programming on the 14th. The Lees' return flight also changed from the originally reported itinerary to the Committee, instead returning to Salt Lake City versus the originally reported itinerary back to Washington due to the conclusion of the Senate's vote schedule. There were several adjustments to the agenda to report from the original copy submitted to the Ethics Committee. First, Majority Leader Thune was not able to attend World Forum and his planned session on Friday, March 14 from 5-6:15pm, and the session was replaced with a 5-6:15pm policy discussion with Gov. Glenn Youngkin, moderated by Kristen Soltis Anderson. Masih Alinejad was unable to attend World Forum and thus, her 8:45-9:45pm session on Saturday, March 15 with Kori Schake on Iran policy was replaced with a panel on America's 250th anniversary and constitutional policy, featuring Allen Carl Guelzo, Adam White, and Yuval Levin. Lastly, several other registered speakers could not attend, including Erik Brynjolfsson for the March 15 Artificial Intelligence panel and Sen. John Cornyn for the March 15 tax panel.

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

☐ Yes ☒ No

Explanation: There were no additional changes to the pre-approved trip.

 WORLD FORUM | SEA ISLAND, GA

December 2, 2024

The Honorable Mike Lee
United States Senate
363 Russell Senate Office Building
Washington, DC 20510

Dear Senator Lee,

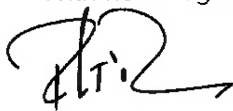
I am writing to invite you and your spouse to the American Enterprise Institute's annual World Forum, which will be held March 13-16, 2025, in Sea Island, Georgia.

AEI's World Forum has a remarkable 40-year history that has made it one of the most important gatherings of influential leaders grappling with the most critical policy challenges of the day. Every year, we convene a group of world leaders from government, business, media, and academia to discuss the major challenges facing the free world. In recent years, our agenda has included remarks from Elon Musk, Tim Cook, Mark Zuckerberg, George W. Bush, and Michael Bloomberg. In 2024, among our featured speakers were Jamie Dimon, Sundar Pichai, Greg Brockman, and House and Senate leadership.

What continues to set AEI's Forum apart from other events of its kind, however, is its reputation as one of the most substantive and thought-provoking off-the-record events that features serious, civil debate on both today's urgent issues and those that are further afield. Your participation as a speaker would add great value to these conversations.

I very much hope you will be able to join us next year. I have enclosed the agenda and participant list from this year's World Forum, and I will share with you the 2025 program agenda as it takes shape.

With warm regards,



Robert Doar
President
American Enterprise Institute

Enclosures





W O R L D
F O R U M

SEA ISLAND, GEORGIA

MARCH 13-16, 2025

Note: The information in this program and all AEI World Forum discussions are confidential and off-the-record.

2025 AEI World Forum



AEI's 2025 World Forum will address the challenges that the United States and its allies face in economics, security, and social welfare. The annual event is completely off-the-record and attracts top business and financial executives and entrepreneurs, as well as distinguished statesmen, scholars, and military leaders from around the world. Discussions of varying size are carefully structured to be candid, provocative, and informative. A premium is placed on lively debate, contrarian thinking, and solutions-oriented discussion.

Unencumbered by political or special interests, as always, the Forum focuses on creative and forward-looking ideas in pursuit of independent and innovative solutions with real-world impact. AEI expects the World Forum to inspire ideas that expand human dignity and human potential at home and abroad. The mix of participants' knowledge, experience, savvy, and talent makes the World Forum a unique venue for insight and intelligence unavailable at any other gathering.

The event, held annually at the Cloister on Sea Island, Georgia, is a private event for the purpose of encouraging a frank and free-ranging competition of ideas. Ample time is reserved for social events, sports and recreation, and private meetings. Spouses and significant others are encouraged to attend and participate in the Forum's discussions.

The 2025 World Forum agenda is currently in development. As an example, the 2024 agenda and participant list follow.



From March 13 to 16, 2025, all of Sea Island will be devoted to the AEI World Forum.

Located along five miles of private beach on the Atlantic coast, Sea Island has served as an unrivaled luxury resort and vacation and meeting destination since 1928.

private aircraft.

is approximately a one-hour drive from both cities' international airports.

AEI WORLD FORUM

2024 AGENDA

Thursday, March 7

All Day	Registration	Colonial Lounge
5:00–5:50 p.m.	Reception	The Beach Club
5:50–6:00 p.m.	Welcome Remarks Robert Doar	The Beach Club
6:00–6:45 p.m.	Opening Conversation The States of the Union: Two Governors' Views Brian Kemp Ned Lamont Chris Stirewalt (Moderator)	The Beach Club
6:45–7:45 p.m.	Dinner	The Beach Club
7:45–10:15 p.m.	Post-Dinner Reception	The Cloister
8:15–9:00 p.m.	Evening Conversation A Conversation with Greg Brockman, Cofounder and President of OpenAI Paul Gigot (Moderator)	The Cloister Ballroom
9:00 p.m.	Livestream State of the Union Address	The Cloister
9:15–10:15 p.m.	Starlight Chats The Changing National Collegiate Athletic Association Charles Baker James E. Delany William Weatherford (Moderator)	The Cloister
	Life-and-Death Decisions in Seconds: Mission Control During Apollo Gene Kranz Charles Murray (Moderator)	On and off the field, college sports commanded Americans' attention this past year. The financial compensation of student-athletes through name, image, and likeness deals; the ever-increasing transfer rates of athletes; and conference realignment have transformed the traditional landscape of college athletics. How should universities, student-athletes, and fans understand and react to these developments? Are they a unique opportunity for growth or a threat to the integrity of competition? And what's coming next? National Collegiate Athletic Association President Charles Baker and former Big 10 Commissioner James E. Delany will provide an insider perspective on these issues in a conversation moderated by AEI trustee William Weatherford.
		When Apollo 11 first put human beings on the moon, Gene Kranz was the flight director for the lunar landing. When the Apollo 13 service module exploded in space, Mr. Kranz was the flight director who successfully brought the astronauts home. For this, he was awarded the Presidential Medal of Freedom, the nation's highest civilian honor, and he was portrayed by Ed Harris in the 1995 film <i>Apollo 13</i> . Mr. Kranz was NASA's second chief flight director and directed missions for the Mercury, Gemini, and Apollo programs. He is the author of a <i>New York Times</i> bestselling memoir <i>Failure Is Not an Option: Mission Control from Mercury to Apollo 13 and Beyond</i> . Join Charles Murray, coauthor of <i>Apollo: The Race to the Moon</i> , for a conversation with this American hero.

AEI WORLD FORUM

2024 AGENDA

Friday, March 8

7:30–9:30 a.m.	Breakfast Opens	The Cloister
8:00–9:00 a.m.	Early Bird Sessions Is India Really Rising? Bhaskar Chakravorti Derek Scissors Ashiey J. Tellis Sadanand Dhume (Moderator)	The Cloister India is the new hot partner country in economics and, potentially, security. The usual basis for this is the country's huge, young population and potential for a full generation of fast economic growth. But those factors were present five years ago, when India received much less attention. What's changed to make it more popular? One possibility is the country's policy choices. Another, though, is that India is basically the same and the world is just more desperate for an economic success not named China. This panel will debate bullish and bearish views of India and then consider some of the political and military implications of India hype rising versus India really rising.
	Rescuing San Francisco from the Far Left Jay Cheng Robert Doar (Moderator)	In 2022, San Francisco voters did the seemingly unthinkable: They recalled their own progressive district attorney, creating a political moment that reshaped the conversation around public safety in the Democratic Party. The City by the Bay did it twice that year, when it also recalled three progressive school board members. How did America's most liberal city come to dramatically reject far-left politics? Join AEI President Robert Doar and Jay Cheng, lead organizer of District Attorney Chesa Boudin's recall and executive director of Neighbors for a Better San Francisco, for a discussion of the political battles that are defining San Francisco and how changing trends and demographics could reshape urban politics in the decade to come.
8:00–9:30 a.m.	Special Exhibit The Situation Room: The Wars in Ukraine and the Middle East Frederick W. Kagan Kimberly Kagan	The Cloister Frederick W. Kagan and the Critical Threats Project (CTP) at AEI work closely with their research partner, the Institute for the Study of War (ISW), led by Kimberly Kagan. CTP and ISW are analyzing the ongoing Russian invasion of Ukraine, the Israel-Hamas war, and Iran's activities in the Middle East. The daily update maps are actively used by most major media outlets, including the BBC, CNN, <i>The Guardian</i> , the <i>Financial Times</i> , the <i>New York Times</i> , and Reuters. This session will showcase the most recent CTP-ISW assessments of the conflicts in Ukraine and the Middle East and provide up-to-date information on the crises.
9:30–10:30 a.m.	Breakout Sessions A Sign of Hope at Public Universities Justin Dyer William Inboden Rob Portman Jenna Silber Storey (Moderator)	The Cloister Public universities in red states have recently launched some of the most ambitious projects in university-level civic education that our country has seen in decades. New efforts on this front are underway in Arizona, Florida, Mississippi, North Carolina, Ohio, Tennessee, Texas, and Utah. Do these innovative programs have a chance to significantly affect the political monoculture on campus? What are their immediate goals and long-term prospects?

How to Think About Addiction

R. Gil Kerlikowske
 Beau Kilmer
 Sally Satel
 Matthew Continetti (Moderator)

The national overdose rate in the country is unprecedented and has been increasing for decades. Why? As highly potent and cheap illicit opioids and stimulants are increasingly produced in labs (not grown in fields), more pressure falls on efforts to reduce Americans' demand for drugs. This requires policymakers and nonspecialist health professionals to understand addiction more clearly. How have supply and demand-reduction practices changed over the years, and do new forms of "harm reduction" hurt or help?

The US Economic Outlook: Soft Landing, Hard Landing, or No Landing?

Jason Furman
 Michael R. Strain
 Lawrence H. Summers
 Kevin Warsh
 Mark Zandi
 James Pethokoukis (Moderator)

Many economists expected a recession in 2023. But consumers proved surprisingly resilient in the face of rapidly increasing interest rates, and inflation decelerated with less labor market damage than many feared and expected. What is in store for the economy in 2024? Opinions vary widely, with substantial disagreement among forecasters, investors, and Federal Reserve officials. Will the Fed achieve a "soft landing," in which unemployment stays low and inflation returns to its target rate? Will the delayed effect of interest rates and geopolitical uncertainty lead to a recession? Or will the economy reaccelerate as inflation-adjusted incomes increase? Our panel of top economists will discuss their outlook for 2024.

10:45 a.m.–12:15 p.m. Morning Keynote

A Conversation with Jamie Dimon, Chairman and CEO of JPMorgan Chase & Co.
 Robert Doar (Moderator)

The Cloister Ballroom

12:30–1:45 p.m.

Luncheon
A Conversation with Sundar Pichai, CEO of Google and Alphabet
 Rob Portman (Moderator)

The Beach Club

2:00–3:15 p.m.

Afternoon Sessions
How to Make Society Friendlier to Families

Erika Bachiochi
 Patrick T. Brown
 Timothy P. Carney
 Ramesh Ponnuru (Moderator)

The Cloister

American birth rates hit record lows even before the pandemic and have kept falling. Parents and children are more anxious than ever before. What are the causes of this baby bust and anxiety boom, and what could reverse them? Building on the arguments of Timothy P. Carney's new book, *Family Unfriendly: How Our Culture Made Raising Kids Much Harder Than It Needs to Be*, this panel will discuss the policy, economic, and cultural dimensions of this crucial question.

Regulation and the Courts: Reflections on the Business Environment

Rachel Brand
 Brent J. McIntosh
 Jennifer G. Newstead
 Adam J. White (Moderator)

Businesses today face unprecedented regulatory challenges: tidal waves of federal and state regulations, jarring regulatory uncertainty from one administration to the next, and a heated new political environment. For all these reasons and more, major corporations' chief legal officers have a unique window into the modern administrative state. Chief counsels of several leading companies in different sectors will offer insights into the modern regulatory environment.

The Return of Antisemitism

Jeffrey A. Rosen
 Bret Stephens
 Bari Weiss
 Danielle Pietka (Moderator)

(Concludes at 3:30 p.m.)

The phrase "never again" became a mantra after the Holocaust, but in truth, many believed that the kind of Jew hatred that fueled the Nazi genocide had seen its last days in 1945. However, the post-October 7 explosion of antisemitism—in the streets of America and Europe, on college campuses worldwide, and online—belied that belief, leaving Jewish communities shell-shocked. Where did this antisemitism come from? Is it more prevalent on the left than the right? Is anti-Zionism the same as antisemitism? And how can antisemitism be defeated?

AEI WORLD FORUM

2024 AGENDA

2:00–4:45 p.m.	Special Exhibit The Situation Room: The Wars in Ukraine and the Middle East Frederick W. Kagan Kimberly Kagan	The Cloister Frederick W. Kagan and the Critical Threats Project (CTP) at AEI work closely with their research partner, the Institute for the Study of War (ISW), led by Kimberly Kagan. CTP and ISW are analyzing the ongoing Russian invasion of Ukraine, the Israel-Hamas war, and Iran's activities in the Middle East. The daily update maps are actively used by most major media outlets, including the BBC, CNN, <i>The Guardian</i>, the <i>Financial Times</i>, the <i>New York Times</i>, and Reuters. This session will showcase the most recent CTP-ISW assessments of the conflicts in Ukraine and the Middle East and provide up-to-date information on the crises.
3:30–5:00 p.m.	Afternoon Break	
5:00–6:00 p.m.	Evening Conversation A Conversation with Marc Andreessen, Cofounder and General Partner at Andreessen Horowitz James Pethokoukis (Moderator)	The Cloister Ballroom
6:00–7:00 p.m.	Reception	The Cloister
7:15–8:30 p.m.	Dinner	The Cloister
8:30–9:45 p.m.	Reception	The Cloister
8:45–9:45 p.m.	Starlight Chats A Conversation with Bari Weiss Yuval Levin (Moderator) A Conversation with Lawrence H. Summers Michael R. Strain (Moderator)	The Cloister
		Lawrence H. Summers is one of the nation's most distinguished economists and public servants. He has served as the 71st secretary of the Treasury (1999–2001), director of the National Economic Council (2009–10), and president of Harvard University (2001–06). He currently serves on the board of OpenAI. Dr. Summers is a leading voice on a wide range of issues, including the economic outlook, future trends in the domestic and global economies, the state and future of higher education, and the future of artificial intelligence. He is an insider at the highest levels of the Democratic Party while remaining an independent, nonpartisan public intellectual. Join him and Michael R. Strain for a wide-ranging conversation.

AEI WORLD FORUM

2024 AGENDA

Saturday, March 9

7:30–9:30 a.m.	Breakfast Opens	The Cloister
8:00–9:00 a.m.	Early Bird Sessions	The Cloister
	An Agenda for Restoring Our Constitution	
	Jack Landman Goldsmith	When Americans think about threats to the Constitution today, we tend to have in mind particular individuals or extreme events. But the broader dysfunction of key institutions is a deeper and more complicated problem. What would it take to restore the basic balance of our system of government—to help Congress, the executive branch, the courts, the states, and the public reclaim their proper roles? And how can we help the American people understand our constitutional challenges in their full scope?
	Yuval Levin	
	Patrick McHenry	
	Adam J. White (Moderator)	
	Is There Life in China After the Chinese Communist Party?	
	Mike Gallagher	Is the Chinese Communist Party's (CCP) rule fundamentally stable? Historically, analysts and policymakers have often overestimated the staying power of totalitarian regimes. After a decade of Stalin-esque purges by Chairman Xi Jinping, a failed "zero COVID" policy, economic stagnation, and the absence of a succession plan, will the party hold on to power? What is the state of dissent and opposition in China? Has Xi managed to completely destroy all competing centers of power? If a challenge to CCP rule emerged, what might it look like? This panel will discuss whether the US has an interest in CCP stability and what Washington's strategy toward Chinese internal politics should be.
	John Garnaut	
	Daniel Tobin	
	Dan Blumenthal (Moderator)	
8:00–10:30 a.m.	Special Exhibit	The Cloister
	The Situation Room: The Wars in Ukraine and the Middle East	
	Frederick W. Kagan	Frederick W. Kagan and the Critical Threats Project (CTP) at AEI work closely with their research partner, the Institute for the Study of War (ISW), led by Kimberly Kagan. CTP and ISW are analyzing the ongoing Russian invasion of Ukraine, the Israel-Hamas war, and Iran's activities in the Middle East. The daily update maps are actively used by most major media outlets, including the BBC, CNN, <i>The Guardian</i> , the <i>Financial Times</i> , the <i>New York Times</i> , and Reuters. This session will showcase the most recent CTP-ISW assessments of the conflicts in Ukraine and the Middle East and provide up-to-date information on the crises.
	Kimberly Kagan	
9:30–10:30 a.m.	Breakout Sessions	The Cloister
	The End of the Neoliberal Consensus?	
	Ami Bera	President Ronald Reagan pursued a supply-side economic agenda. President Bill Clinton famously declared in 1996 that "the era of big government is over" and balanced the federal budget. Subsequent administrations pursued free trade agreements and championed American economic leadership. But Presidents Donald Trump and Joe Biden have abandoned this consensus approach, favoring protectionism for domestic manufacturing, industrial policy, and fiscal irresponsibility. Should the US return to the "neoliberal consensus," or is a larger role for the government in the economy advisable? Is economic nationalism a phase brought on by populism, or does it represent the future for economic policy?
	Byron Donalds	
	R. Glenn Hubbard	
	Jason Smith	
	Mark Zandi	
	Alex Brill (Moderator)	

AEI WORLD FORUM

2024 AGENDA

The Long COVID for America's Schools

Nat Malkus
Robert Doar (Introduction)

The COVID-19 pandemic, and policymakers' responses to it, brought unprecedented challenges to the nation's students and schools. Extended school closures, masking fights, and pandemic disruptions led to historic learning losses, uneven enrollment declines, declining student well-being, and skyrocketing chronic absenteeism. Despite \$190 billion in federal pandemic relief, schools are still struggling to recover. How did education leaders respond during the pandemic? What are the primary challenges for schools today? What is the outlook for America's public schools after the pandemic?

The War on Poverty at 60

Nicholas Eberstadt
William Galston
Charles Murray
Scott Winship (Moderator)

In January 1964, President Lyndon Johnson declared "unconditional war on poverty in America." By 1973, a strong economy had pushed wages up and unemployment and poverty down. Since then, the official poverty rate has risen slightly, despite vast increases in federal antipoverty spending. At the same time, upward intergenerational mobility is no better, family breakdown has worsened, and rising numbers of men have dropped out of the labor force. Has the expanded safety net—and reforms to it to promote independence—helped or hurt families? Has the American economy failed the neediest among us?

10:45 a.m.–12:00 p.m. General Session

America in a Disordered World

Frederick W. Kagan
Paul M. Nakasone
Kori Schake
Ha' Brands (Moderator)
And others in our community, including:
Ami Bera
Garret Graves
Jimmy Panetta
Michael Waltz
Brad Wenstrup

The Cloister Ballroom

The world is more disordered and violent today than at any time in decades. Russia's invasion of Ukraine, the largest armed conflict in Europe since World War II, is entering its third year. The war in Gaza and aggression from Iranian-backed militants throughout the region are drawing the US military back into the Middle East. And a US-China cold war is playing out in Asia and around the globe. While the world becomes more unstable, Americans are debating what role the US should have in global conflicts—or if it should have one at all. Join AEI scholars and other members of the AEI community for a discussion on what the role of American power can and should be in a turbulent era.

12:30–1:45 p.m.

Luncheon

A Conversation with Christopher L. Eisgruber and Ben Sasse

Yuval Levin (Moderator)

The Beach Club

America's universities are among the nation's greatest assets and sources of pride. But from battles over free expression and affirmative action to an explosion of antisemitism, campus controversies have been rampant in recent years, and many Americans worry about where the academy is headed. In this session, the presidents of Princeton University and the University of Florida will consider the good, the bad, and the ugly of this moment on campus.

2:00–3:15 p.m.

Afternoon Sessions

Freedom's Forge Redux: Can America Restore Its "Arsenal of Democracy"?

Eric Fanning
Deb Fischer
Rex Geveden
Heather Wilson
Mackenzie Eaglen (Moderator)

The Cloister

Deliberate policy choices over the past 30 years have created a military manufacturing and tech ecosystem that is struggling to ramp up to support allies at war in two regions. Compounding the challenge is that the Pentagon is no longer a monopsony buyer, able to move markets and attract competition. Knocked off its perch as a core inventor of world-changing technologies like the internet and artificial intelligence, the US military must now innovate with existing commercial technologies. How can the defense bureaucracy help industries ranging from the traditional to software startups? Can the American military refill its magazines while preparing for potential war in a third theater?

The Hamas-Israel War: Next Steps

Haviv Gur
Bernard Haykel
Frederick W. Kagan
Danielle Pletka (Moderator)

October 7, 2023, ushered in a new era in the Middle East. The attack was unlike any the Jewish people had seen since the Holocaust. Iran's complicity is clear. Israel has declared total war against its Gaza enemies. And Iran's proxies have, without serious consequence to Tehran, widened the conflict to target US allies and interests. How will this end? Will there be a state of Palestine as a consequence? War with Lebanon? Can Iran skate scot-free?

Teenage Mental Health—an American Crisis

Katie Britt
Shelley Moore Capito
Kay Hymowitz
Sally Satel
Naomi Schaefer Riley (Moderator)

A year ago, the surgeon general declared that the decline in youth mental health was "the defining public health crisis of our time." With significant increases in major depressive episodes, anxiety, mood disorders, and self-harm, children and adolescents are clearly suffering. Yet the pervasiveness of harmful technology, the breakdown of institutions like family and religion, and a rise in substance abuse make it hard to pinpoint the precise cause of this crisis. Where did the problem originate? And how will we get ourselves out of it?

3:30–4:45 p.m.

Special Exhibit

The Situation Room: The Wars in Ukraine and the Middle East

Frederick W. Kagan
Kimberly Kagan

The Cloister

Frederick W. Kagan and the Critical Threats Project (CTP) at AEI work closely with their research partner, the Institute for the Study of War (ISW), led by Kimberly Kagan. CTP and ISW are analyzing the ongoing Russian invasion of Ukraine, the Israel-Hamas war, and Iran's activities in the Middle East. The daily update maps are actively used by most major media outlets, including the BBC, CNN, *The Guardian*, the *Financial Times*, the *New York Times*, and Reuters. This session will showcase the most recent CTP-ISW assessments of the conflicts in Ukraine and the Middle East and provide up-to-date information on the crises.

3:30–5:00 p.m.

Afternoon Break

5:00–6:00 p.m.

Evening Conversation

The Cloister Ballroom

A Conversation with Mike Johnson and Steve Scalise

Matthew Continetti (Moderator)

5:00 p.m.

Shuttle Departs for Mass*

The Cloister

*Mass will begin at 5:30 p.m. at St. William Catholic Church.

Shuttles will return to the Cloister at 6:45 p.m.

6:00–7:00 p.m.

Reception

The Cloister

7:15–8:30 p.m.

Dinner

The Cloister

8:45–9:45 p.m.

Starlight Chats

The Cloister

Advances in Artificial Intelligence

Erik Brynjolfsson
Scott Gottlieb
Michael R. Strain
Todd C. Young
James Pethokoukis (Moderator)

It seems as if every day brings new advances in artificial intelligence. OpenAI's GPT-4 passes not only the Turing test but the bar exam and medical school exams. Beyond natural language processing, AI could lead to substantial advances in drug discovery, revolutionize education, and stop a mass extinction event. But concerns abound. AI will lead to substantial economic disruption and threatens to displace millions of workers. Some experts are even more worried, suggesting that AI could lead to the extinction of the human race. Join our panel of scientists, economists, and technologists on the front lines of AI development to discuss these amazing technological developments—and what the future might hold.

The Art of Federal Prosecution: Trying Cases in the Southern District of New York

Danielle Sassoon

Robert Doar (Moderator)

The US District Court for the Southern District of New York (SDNY) has witnessed some of the most famous criminal prosecutions in US history, including those of Julius and Ethel Rosenberg, Alger Hiss, and Bernie Madoff. Trials there have more attention and higher stakes than almost anywhere else. In a lively conversation with AEI President Robert Doar, Assistant US Attorney Danielle Sassoon will discuss what it takes to prosecute a major case in the SDNY, drawing from her own experience as one of the lead prosecutors of Sam Bankman-Fried. Sassoon will provide her own perspective on how to build and try complex cases, from investigation through conviction, and the broader importance of the rule of law.

The Cockpit Is Empty: Political "Leadership" in a Leaderless Age

Jonah Goldberg

Reception

The Cloister

8:45–10:30 p.m.

Sunday, March 10 (Daylight Saving Time)

7:30–10:30 a.m.

Breakfast Opens

The Cloister

7:30 a.m.

*Shuttle Departs for Mass**

The Cloister

Mass will begin at 8:00 a.m. at St. William Catholic Church.Shuttles will return to the Cloister at 9:15 a.m.*

9:00–10:30 a.m.

Early Bird Sessions

The Cloister

China's Three Roads to Controlling Taiwan: How Can a US-Led Coalition Respond?

Dan Blumenthal

Frederick W. Kagan (Moderator)

Under Xi Jinping's rule, the Chinese Communist Party is publicly preparing to force unification between Taiwan and mainland China, potentially through military action. Many in Washington fear that a major war between the US and China over Taiwan's independence is right around the corner. But what if China can force unification without starting a devastating war? What are China's other roads to achieving its goals in Taiwan? And how can the US and a coalition of other countries prepare for and forestall other scenarios? Join Dan Blumenthal and Frederick W. Kagan for a conversation about their new major project, the Coalition Defense of Taiwan, and their initial findings.

Conversations with Senate Republicans

9:00–9:45 a.m.

A Conversation with Shelley Moore Capito and John Thune

Rob Portman (Moderator)

9:45–10:30 a.m.

A Conversation with John Cornyn

Marc A. Thiessen (Moderator)

AEI WORLD FORUM

2024 PARTICIPANTS

SPEAKERS

MARC ANDREESSEN	Andreessen Horowitz
ERIKA BACHIOCHI	Ethics & Public Policy Center
CHARLES D. BAKER	National Collegiate Athletic Association
AMI BERA	US House of Representatives (D-CA)
RACHEL BRAND	Walmart Inc.
KATIE BRITT	US Senate (R-AL)
GREG BROCKMAN	OpenAI
PATRICK T. BROWN	Ethics & Public Policy Center
ERIK BRYNJOLFSSON	Stanford University
SHELLEY MOORE CAPITO	US Senate (R-WV)
BHASKAR CHAKRAVORTI	Fletcher School, Tufts University
JAY CHENG	Neighbors for a Better San Francisco
JOHN CORNYN	US Senate (R-TX)
ROBERT DARNTON	Harvard University
JAMES E. DELANY	Delany Advisory Inc.
JAMIE DIMON	JPMorgan Chase & Co.
BYRON DONALDS	US House of Representatives (R-FL)
JUSTIN DYER	University of Texas at Austin
CHRISTOPHER L. EISGRUBER	Princeton University
ERIC FANNING	Aerospace Industries Association
DEB FISCHER	US Senate (R-NE)
CAITLIN FLANAGAN	<i>The Atlantic</i>
JASON FURMAN	Harvard University
MIKE GALLAGHER	US House of Representatives (R-WI)
WILLIAM GALSTON	Brookings Institution
JOHN GARNAUT	Garnaut Global
REX D. GEVEDEN	BWX Technologies Inc.
PAUL A. GIGOT	<i>Wall Street Journal</i>
GARRET GRAVES	US House of Representatives (R-LA)
HAVIV GUR	Times of Israel
BERNARD HAYKEL	Princeton University
KAY HYMOWITZ	Manhattan Institute
WILLIAM INBODEN	University of Florida Hamilton Center
MIKE JOHNSON	Speaker of the US House of Representatives (R-LA)
KIMBERLY KAGAN	Institute for the Study of War
BRIAN KEMP	Governor of Georgia
R. GIL KERLIKOWSKIE	Office of National Drug Control Policy (retired)
BEAU KILMER	RAND Corporation
GENE KRANZ	
NED LAMONT	Governor of Connecticut
PATRICK MCHENRY	US House of Representatives (R-NC)
BRENT J. MCINTOSH	Citi
PAUL M. NAKASONE	US Army (retired)
JENNIFER G. NEWSTEAD	Meta

WORLD FORUM
2024 PARTICIPANTS

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JASON SMITH	US House of Representatives (R-MO)
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MARK ZANDI	Moody's Analytics

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MARY PAT & CHRIS CHRISTIE	Christie 55 Solutions/55th Governor of New Jersey
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 Eagle Capital Management LLC
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 Bellevue Foundation/Cambria Group

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 Searle Freedom Trust
 Windquest Group
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 AEA Investors
 International Paper (former)
 Gideon Hixon Fund
 Triad Foundation Inc.
 FFL Partners LLC (retired)
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 Campaign for Final Five Voting

DivcoWest

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 Sarah Scaife Foundation
 American Express
 Jane Street Capital LLC
 Centerview Partners
 Brown Advisory
 Gulbrandsen Companies
 LG Group
 Hanna Capital LLC
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 Harbert Management Corporation

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WILLIAM WEATHERFORD	Weatherford Capital
BRAD WENDT	
GREGORY W. WENDT	Capital Group
LISA & CHRISTOPHER A. ZOOK	Celebrate by Lisa Lou/CAZ Investments

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R. GLENN HUBBARD	Nonresident Senior Fellow
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LUKE STRANGE	Managing Director, Government Relations
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ADAM J. WHITE
SCOTT WINSHIP

Senior Fellow
Senior Fellow; Director, Center on Opportunity and Social Mobility

SPEAKER GUESTS

DAN BACHIOCHI	VideaHealth
JANINE VIVIENNE BERA	
JEN BLUMENTHAL	
WESLEY BRITT	
ANNA BROCKMAN	
CHARLES CAPITO	United Bankshares Inc.
JONATHAN COHN	Lehotsky Kettler Cohn LLP
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MARY EBERSTADT	Faith and Reason Institute
JESSICA GAVORA	
ALLISON GOTTLIEB	
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CONSTANCE POND HUBBARD	
ROB HUDNUT	Wisteria Productions
PAUL HYMOWITZ	Clinical Psychologist
RANA SIU INBODEN	Strauss Center, University of Texas
KELLY JOHNSON	
ADAM KATZ	Irenic Capital Management
MARTY KEMP	First Lady of Georgia
JEANNIE KRANZ	
ANNIE LAMONT	
ANNA LASZLO	Fair and Impartial Policing LLC (retired)
LORI A. MARTIN	WilmerHaie
GIULIA MCHENRY	Federal Communications Commission
LAURA AHN MCINTOSH	Wachtell, Lipton, Rosen & Katz
RYAN MEYERS	American Petroleum Institute
ALEXANDER MISHKIN	Lime Rock New Energy
SUSAN NAKASONE	
JULIA NESHEIWAT	TC Energy
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WAYNE SCHAKE	

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theGROUP

Cushman & Wakefield

Moody's Analytics

CONFIDENTIAL

2025 Contact Information

If you have any questions regarding the World Forum, please contact:

Jacqueline Derks
American Enterprise Institute
1789 Massachusetts Avenue, NW
Washington, DC 20036

WorldForum@aei.org



AEI: 2025 AEI World Forum

 MIKE LEE

Title:
Senator

Employing Office/Committee:
LEE, MIKE

Duty Station:
ALPINE,UT

Destination(s):
Sea Island, Georgia

Explain how this trip is specifically connected to the traveler's official or representational duties:

Not applicable for Senators and Officers.

Name of accompanying family member (if any):
Sharon Lee

Name and Relationship to Traveler:
Spouse

Organization Information

Organization Name
AEI

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

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

Address
1789 Massachusetts Avenue

Address 2 (Optional)
None

City, State Zip
Washington, District Of Columbia 20036 United States

Phone Number
2024195250

Organization URL

History of Congressional Travel

This is the 42nd year of World Forum. Each Forum, AEI invites a number of public officials to join the conversation. Members from both House and Senate regularly attend as speakers.

Educational Activities

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

Lobbyist and Foreign Agent Registration Information

Lobbyist Registration Status: *I certify that the sponsor is not a federally registered lobbyist and do not retain or employ a federally registered lobbyist.*

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.

AEI's World Forum focuses on creative and forward-looking ideas in pursuit of independent and innovative policy solutions with real-world impact. AEI organizes the entire conference, travel, and agenda, while AEI scholars lead panel discussions on a variety of policy issues. AEI is responsible for all logistical aspects of getting the Senator to and from the conference.

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

AEI is a non-profit, tax-exempt, public policy research organization. The World Forum seeks to encourage frank and free-ranging conversations over a number of public policy issues important to today's world. AEI expects the Forum to inspire ideas that expand human dignity and human potential at home and abroad.

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

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.

Travel Details

Trip Start Date/Time:
03/14/2025 @ 09:24 AM



Trip End Date/Time:
03/16/2025 @ 03:20 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: \$1,503.54 | Accompanying Family Member: \$928.97)

Traveler Type	Transportation Type	Class	Amount
Member/Officer/Employee	Airfare	Coach	\$928.97
Note Roundtrip coach-class airfare, DCA-JAX			
Member/Officer/Employee	Ground Transportation	Coach	\$574.57
Note Roundtrip ground transportation costs from Jacksonville Airport to Sea Island; costs only charged once per couple and includes relevant taxes and fees. The same ground transportation options are offered to all conference speakers.			
Accompanying Family Member	Airfare	Coach	\$928.97
Note Roundtrip coach-class airfare, DCA-JAX			

Lodging (Per Member/Officer/Employee: \$1,377.46 | Accompanying Family Member: \$0.00)

Traveler Type	Check-In	Check-Out	Facility	City	State	Country	Nights	Cost/Night	Cost Exceed Per Diem
Member/Officer/Employee	03/14/2025	03/16/2025	The Cloister at Sea Island	Sea Island	Georgia	United States	2	\$688.73	Yes
Cost Exceeds Per Diem Reason This is the only lodging option as it's a private island and this is the only hotel. Lodging rates are charged once per couple and are subject to decrease based on final room availability, room-type assignment, and length of stay. The listed is the maximum nightly rate (including taxes and fees) for the standard room type at Sea Island. The exact same lodging options are offered to all conference speakers and their accompanying spouse.									

Meals (Per Member/Officer/Employee: \$1109.20 | Accompanying Family Member: \$1109.20)

Traveler Type	Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
Accompanying Family Member	03/14/2025	\$0.00	\$78.00	\$302.40	\$40.73	\$421.13	Sea Island	Georgia	United States	Yes
Cost Exceeds Per Diem Reason This is the only meal option as it's a private island and is the only hotel. Costs subject to decrease depending on length of stay and include receptions under incidental costs. The exact same meal options are offered to all conference speakers and their accompanying spouse.										
Member/Officer/Employee	03/14/2025	\$0.00	\$78.00	\$302.40	\$40.73	\$421.13	Sea Island	Georgia	United States	Yes
Cost Exceeds Per Diem Reason This is the only meal option as it's a private island and is the only hotel. Costs subject to decrease depending on length of stay and include receptions under incidental costs. The exact same meal options are offered to all conference speakers and their accompanying spouse.										
Member/Officer/Employee	03/15/2025	\$87.00	\$78.00	\$356.00	\$80.07	\$601.07	Sea Island	Georgia	United States	Yes
Cost Exceeds Per Diem Reason This is the only meal option as it's a private island and is the only hotel. Costs subject to decrease depending on length of stay and include receptions under incidental costs. The exact same meal options are offered to all conference speakers and their accompanying spouse.										
Accompanying Family Member	03/15/2025	\$87.00	\$78.00	\$356.00	\$80.07	\$601.07	Sea Island	Georgia	United States	Yes
Cost Exceeds Per Diem Reason This is the only meal option as it's a private island and is the only hotel. Costs subject to decrease depending on length of stay and include receptions under incidental costs. The exact same meal options are offered to all conference speakers and their accompanying spouse.										
Member/Officer/Employee	03/16/2025	\$87.00	\$0.00	\$0.00	\$0.00	\$87.00	Sea Island	Georgia	United States	Yes
Cost Exceeds Per Diem Reason This is the only meal option as it's a private island and is the only hotel. Costs subject to decrease depending on length of stay and include receptions under incidental costs. The exact same meal options are offered to all conference speakers and their accompanying spouse.										
Accompanying Family Member	03/16/2025	\$87.00	\$0.00	\$0.00	\$0.00	\$87.00	Sea Island	Georgia	United States	Yes
Cost Exceeds Per Diem Reason This is the only meal option as it's a private island and is the only hotel. Costs subject to decrease depending on length of stay and include receptions under incidental costs. The exact same meal options are offered to all conference speakers and their accompanying spouse.										

Reasonable Miscellaneous Expenses (Per Member/Officer/Employee: \$20,000.00 | Accompanying Family Member: \$0.00)

Traveler Type	Expense Type	Amount	Notes
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Traveler Type	Expense Type	Amount	Notes
Member/Officer/Employee	Conference Fees	\$20,000.00	The World Forum registration fee is always waived for all speakers, regardless of their status in or out of government. The registration fee for paying, non-speaking attendees includes the costs of meals, transportation, and all programming costs as part of the fee and always includes a guest as part of the cost. The registration fee primarily helps AEI offset the organizational, staffing, lodging, transportation, AV equipment rental, labor, security, engineering, gratuities, rentals, printed materials such as folders and agendas, and facilities costs all required to coordinate this private event as a 501(c)(3) nonprofit educational institution.

Additional Attachments All additional attachments are below.**Document Name**

2025 AEI World Forum Invitation for Senator and Mrs Lee