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

Date/Time Stamp

RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS
2026 APR 14 AM 11:52

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):
AEI

Travel Dates:
03/12/2026 to 03/16/2026

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

Relationship to Traveler:
Spouse

Expenses

Transportation Expenses	Lodging Expenses	Meals Expenses	Other Expenses (Amount & Description)
$1,776.49	$1,809.45	-$680.14	$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.

4/14/2026
Date

MIKE LEE
Printed Name of Traveler

Signature of Traveler

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
Lodging	$1,809.45	Total lodging amount for Sen. Mike Lee and Mrs. Sharon Lee. The nightly rate of $603.15 was lower than initial rate given to the Committee based on room type availability.
Meals	-$680.14	Updated meal costs for Sen. Mike Lee and Mrs. Sharon Lee, amended to remove the costs of the Thursday reception and dinner for both ($340.07 each) due to the Lees' flight arrival times.
Transportation	$1,776.49	Revised, total transportation costs for Sen. Mike Lee and Mrs. Sharon Lee, including updated one-way coach-class airfare for 3/12 flight from BWI-JAX ($686.40 each) due to cancellation of original flight. Also inclusive of $403.69 roundtrip, coach-class ground transportation from JAX-Sea Island on 3/12 and Sea Island-BQK on 3/16. Sen. and Mrs. Lee privately covered the costs of their return flights from BQK-DCA and BQK-SLC on 3/16.

Were there any changes to the pre-approved itinerary?

(●) Yes ( ) No

Explanation: There were two changes to the agenda regarding speakers. First, the Saturday afternoon session with Reza Pahlavi, Crown Prince of Iran, was cancelled due to a change in his schedule. Additionally, Rep. Jimmy Panetta joined the Saturday evening panel on allies and global security alongside existing panelists Kori Schake, Sen. Roger Wicker, Gen. Chris Cavoli, and Michael Beckley.

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

( ) Yes (●) No

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

From: Luke Strange <Luke.Strange@aei.org>
Date: Thursday, September 18, 2025 at 2:38 PM
To: "Curry, Max (Lee)" <Max_Curry@lee.senate.gov>
Cc: Chris Gavin <chris.gavin@AEI.org>, Erin Naumann <Erin.Naumann@AEI.org>
Subject: Speaking invitation: AEI World Forum, March 12-15, 2026

Max,
I am pleased to share an invitation from AEI President Robert Doar to Senator Lee to the 2026 AEI World Forum, being held this March 12-15 in Sea Island, Georgia.

As you know, 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. Senator Lee will be among Senate colleagues and friends, and he knows this event from previous attendance, but the agenda and participants list from the most recent World Forum in March of this year is attached for his review. We would love to have the Senator back with us again this year!

If Senator Lee is able to attend, 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

AEI: 2026 AEI World Forum

MIKE LEE

Title:
Senator

Employing Office/Committee:
LEE, MIKE

Duty Station:
WASHINGTON,DC

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

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

Address 2 (Optional)
None

Phone Number
2024195250

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

Address
1789 Massachusetts Avenue

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

Organization URL

History of Congressional Travel

This is the 43rd 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 does not retain or employ a 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.

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?

- [x] Yes
- [ ] No

Grantmaking Organizations (Optional)

There are no grantmaking organizations.

With or Without Regard for Congressional Participation

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

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

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

Lobbyist/Foreign Agent Financing

- [x] The trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
- [x] No funds or in-kind contributions were earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.

Lobbyist/Foreign Agent Accompaniment

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

- [x] 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:
03/12/2026 @ 06:00 PM

Trip End Date/Time:
03/15/2026 @ 09:58 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: $1,174.57 | Accompanying Family Member: $600.00)

Traveler Type	Transportation Type	Class	Amount
Member/Officer/Employee	Airfare	Coach	$600.00

Note
Average cost of coach-class roundtrip airfare, Washington Reagan DCA-Jacksonville JAX. Final costs subject to airfare availability, travel dates, and specific return destination

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	$600.00

Note
Average cost of coach-class roundtrip airfare, Washington Reagan DCA-Jacksonville JAX. Final costs subject to airfare availability, travel dates, and specific return destination

Lodging (Per Member/Officer/Employee: $2,126.10 | 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	03/12/2026	03/15/2026	The Cloister at Sea Island	Sea Island	Georgia	United States	3	$708.70	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, and all attendees are lodged at event location.

Meals (Per Member/Officer/Employee: $1265.00 | Accompanying Family Member: $1265.00)

Traveler Type	Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem
Accompanying Family Member	03/12/2026	$0.00	$0.00	$0.00	$0.00	**$0.00**	Sea Island	Georgia	United States	Yes

Cost Exceeds Per Diem Reason
This is the only meal option as it's a private island, the only hotel, and is a set menu. 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	03/12/2026	$0.00	$0.00	$0.00	$0.00	**$0.00**	Sea Island	Georgia	United States	Yes

Cost Exceeds Per Diem Reason
This is the only meal option as it's a private island, the only hotel, and is a set menu. 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	03/13/2026	$87.00	$85.00	$306.90	$82.97	**$561.87**	Sea Island	Georgia	United States	Yes

Cost Exceeds Per Diem Reason
This is the only meal option as it's a private island, the only hotel, and is a set menu. 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	03/13/2026	$87.00	$85.00	$306.90	$82.97	**$561.87**	Sea Island	Georgia	United States	Yes

Cost Exceeds Per Diem Reason
This is the only meal option as it's a private island, the only hotel, and is a set menu. 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	03/14/2026	$87.00	$85.00	$358.30	$85.83	**$616.13**	Sea Island	Georgia	United States	Yes

Cost Exceeds Per Diem Reason
This is the only meal option as it's a private island, the only hotel, and is a set menu. 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	03/14/2026	$87.00	$85.00	$358.30	$85.83	**$616.13**	Sea Island	Georgia	United States	Yes

Cost Exceeds Per Diem Reason
This is the only meal option as it's a private island, the only hotel, and is a set menu. 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	03/15/2026	$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, the only hotel, and is a set menu. 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	03/15/2026	$87.00	$0.00	$0.00	$0.00	**$87.00**	Sea Island	Georgia	United States	Yes

Traveler Type	Date	Breakfast	Lunch	Dinner	Incidentals	Total	City	State	Country	Cost Exceeds Per Diem

Cost Exceeds Per Diem Reason
This is the only meal option as it's a private island, the only hotel, and is a set menu. 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
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

Senator Lee and Mrs. Sharon Lee AEI World Forum Invitation

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: 2026 American Enterprise Institute World Forum

Travel Date(s): March 12- March 15, 2026

Travel Destination(s): Sea Island, Georgia

Sponsor: American Enterprise Institute (AEI)

S. Christopher Gavin — *(printed name of sponsor representative)*

Director, Government Relations — *(title)*

(signature of sponsor representative)

2/4/2026 — *(date)*

2026 American Enterprise Institute World Forum

U.S. Senate Invitee List

Senator John Barrasso (R-WY)
Senator Marsha Blackburn (R-TN)
Senator John Boozman (R-AR)
Senator Ted Budd (R-NC)
Senator Bill Cassidy (R-LA)
Senator Susan Collins (R-ME)
Senator John Cornyn (R-TX)
Senator Tom Cotton (R-AR)
Senator Mike Crapo (R-ID)
Senator Ted Cruz (R-TX)
Senator John Curtis (R-UT)
Senator Steve Daines (R-MT)
Senator Jodi Ernst (R-IA)
Senator John Fetterman (D-PA)
Senator Deb Fischer (R-NE)
Senator Ruben Gallego (D-AZ)
Senator Lindsey Graham (R-SC)
Senator Chuck Grassley (R-IA)
Senator Bill Hagerty (R-TN)
Senator Jon Husted (R-OH)
Senator Ron Johnson (R-WI)
Senator John Kennedy (R-LA)
Senator Andy Kim (D-NJ)
Senator James Lankford (R-OK)
Senator Mike Lee (R-UT)
Senator Cynthia Lummis (R-WY)
Senator Mitch McConnell (R-KY)
Senator Dave McCormick (R-PA)
Senator Ashley Moody (R-FL)
Senator Shelley Moore Capito (WV)
Senator Bernie Moreno (R-OH)
Senator Markwayne Mullin (R-OK)
Senator Lisa Murkowski (R-AK)
Senator Pete Ricketts (R-NE)
Senator Jim Risch (R-ID)
Senator Mike Rounds (R-SD)
Senator Brian Schatz (D-HI)

Senator Eric Schmitt (R-MO)
Senator Tim Scott (R-SC)
Senator Rick Scott (R-FL)
Senator Elissa Slotkin (D-MI)
Senator Dan Sullivan (R-AK)
Senator John Thune (R-SD)
Senator Thom Tillis (R-NC)
Senator Mark Warner (D-VA)
Senator Roger Wicker (R-MS)
Senator Todd Young (R-IN)

AEI

WORLD FORUM

SEA ISLAND, GEORGIA

AGENDA AND PARTICIPANTS

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Senator Mike Lee and Mrs. Sharon Lee
Itinerary
March 12-March 15

MARCH 12–15, 2026

AEI WORLD FORUM

2026 AGENDA

Thursday, March 12

6:00-9:58 p.m. **Senator Mike Lee and Mrs. Sharon Lee; DCA-ATL-BQK, DL850,5287**

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9:58 p.m. Ground transportation transfer to Sea Island

Friday, March 13

7:30–9:30 a.m. Breakfast Available — The Cloister

8:00–9:00 a.m. Early Bird Sessions — The Cloister

A Conversation with MP Materials Founder, Chairman, and CEO James Litinsky

Chris Miller (Moderator)

The Trump administration has identified domestic production of rare earths as a crucial national security priority. MP Materials, a rare earth manufacturer, sits at the heart of the administration's strategy—the Department of Defense is its largest shareholder. James Litinsky—the founder, chairman, and CEO—has led MP Materials since its inception in 2017. Join him and AEI's Chris Miller for a conversation about Litinsky's company and the future of the domestic rare earths supply chain.

A New Era for American Universities?

Michael Crow
Alan M. Garber
Jenna Silber Storey (Moderator)

The past year has seen unprecedented federal efforts to push elite universities to reform. How have these aggressive moves looked from some key campuses? What has been useful, and what has been counterproductive? And what is the future of the relationship between the federal government and higher education?

8:30–9:30 a.m.

A Conversation with Blake Moore — Trophy Room

Blake Moore
Matt Continetti (Moderator)

The economy remains a predominant issue for American families, from rising costs to health care and tax rates. Join Blake Moore, Vice Chair of the House Republican Conference and Chairman of the House Budget Committee Health Care Task Force, and Matt Continetti for a timely conversation on the future of economic policymaking in today's Congress.

9:30–10:30 a.m.

Breakout Sessions — The Cloister

Cold War Lessons for the New Cold War in Europe

Hal Brands
William Inboden
Edward Luce
Marc A. Thiessen (Moderator)

Was the "Long Peace" an anomaly or a roadmap? Russia's full-scale aggression against Ukraine has dismantled the illusions of perpetual peace in Europe, and leaders now face the challenges of rearmament and long-term geopolitical competition against authoritarian rivals. What can our past victory in the Cold War teach us about the crisis we face now? This panel will explore how Zbigniew Brzezinski, Henry Kissinger, and Ronald Reagan challenged the Soviet Union and the lessons their strategies offer the West's leaders today.

The Economic Outlook: Is the US Economy Hot or Cold?

Gita Gopinath
Jan Hatzius
Michael R. Strain
Mark Zandi
James Pethokoukis (Moderator)

Headlines argue that the job market is frozen, at its weakest since it limped out of the aftermath of the 2008 financial crisis. Monthly net payroll gains have been pitiful. At the same time, GDP growth is white-hot, the unemployment rate is low, and equity markets are booming. What is the state of the US economy? If the economy is hot, then why aren't President Trump's erratic trade and aggressive immigration policies doing the damage many commentators expected? Why isn't damage to international alliances registering in financial markets? Is 2026 the year the robots will take our jobs? Join our panel of distinguished economists to discuss the outlook for 2026 and its implications for the Federal Reserve.

The Regulatory Environment for Business

Rachel L. Brand
Buddy Carter
Brent J. McIntosh
Jeffrey Taylor
Adam J. White (Moderator)

The Trump administration has advanced a robust deregulatory agenda but has also created some significant regulatory uncertainty. We will consider how chief legal officers at some of America's leading companies perceive the resulting mix of opportunities and pressures and where they think the regulatory environment is headed. What role can policymakers play in addressing the regulatory environment going into 2026?

10:45–11:45 a.m.

Morning Conversation — The Cloister Ballroom

A Conversation with Jamie Dimon

Robert Doar (Moderator)

Jamie Dimon has led JPMorganChase for more than 20 years, overseeing the growth of the nation's largest bank into a global financial institution with more than $4.4 trillion in assets. As one of the United States' most visible and influential business leaders, he's been an outspoken voice for free enterprise, financial stability, and American strength. How is he assessing the Trump administration's record so far, and how is JPMorganChase navigating the geopolitical and technological disruptions that are transforming the global economy? Join Dimon for a fireside chat with AEI President Robert Doar.

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0000000002752 RECEIVED BY: SECRETARY OF THE SENATE Date: April 14, 2026

12:00–1:30 p.m. Luncheon — The Beach Club

Executive Power and the Supreme Court

Jack Goldsmith
Sarah Isgur
Robert Doar (Moderator)

The Trump administration has advanced an ambitious vision of executive power: strengthening control over personnel, challenging the independence of departments and agencies, and aggressively interpreting statutes to assert novel powers as with tariffs—all generating difficult questions for the Supreme Court. No one has done more to analyze these developments than AEI's Jack Goldsmith, a Harvard Law professor and author of the *Executive Functions* Substack. Join Goldsmith and legal journalist Sarah Isgur—whose new book *Last Branch Standing* provides an unmatched, inside look into how the Roberts Court operates right now—for a conversation with AEI President Robert Doar on the legal battles over this new presidentialism.

1:45–3:00 p.m. Afternoon Sessions — The Cloister

Funding the Front Lines: Disrupting the Monopoly of Pentagon Purchasing

Christian Brose
Mackenzie Eaglen
Deb Fischer
Jim Taiclet
Kori Schake (Moderator)

The Department of War is not just a new moniker but a daily reminder to the bureaucracy that everything must change. As the Pentagon pursues sweeping reforms to scale defense manufacturing, industry has been forced to adapt at unprecedented speed. New acquisition rules—along with new contract deals, capital, and structures—are changing the landscape in real time. This high-impact panel brings together senior leaders from the world's most successful defense firms, including traditional prime, neoprime, and private equity. Leaders will explore how the Pentagon and White House are reshaping approaches to industry partnerships and how companies are meeting the demands of modern warfare where industrial power is decisive.

Getting Our Fiscal House in Order

Ami Bera
Jason Furman
R. Glenn Hubbard
Blake Moore
Jason Smith
Alex Brill (Moderator)

The national debt is on an unsustainable path, and the structural budget deficit is so large that the US spends more on interest payments than national defense. How can Congress get the nation's fiscal house in order? Will Congress take steps to secure tariff revenue following the Supreme Court's decision to invalidate much of the 2025 tariff regime? Will Congress increase health spending following the expiration of Affordable Care Act subsidies? What is the outlook for meaningful fiscal consolidation—and what would it take to make it happen?

The Frontier Technologies That Will Power the AI Age

Steve Brierley
Erik Brynjolfsson
Tomás Palacios
Krishna Rangasayee
Chris Miller (Moderator)

This panel will explore some of the scientific and engineering breakthroughs that will shape the future, their commercialization, and their diffusion into business practices. Steve Brierley is the CEO of Riverlane, the quantum computing company. Krishna Rangasayee is the CEO of SiMa.ai, which is bringing AI to technologies like robots, drones, and vehicles. Tomás Palacios, professor at the Massachusetts Institute of Technology, studies frontier industries and technologies. Erik Brynjolfsson, professor at Stanford University and director of the Stanford Digital Economy Lab, is one of the top economists studying technology.

3:00–4:30 p.m. Afternoon Break

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0000000002753 RECEIVED BY: SECRETARY OF THE SENATE Date: April 14, 2026

4:30–6:00 p.m. Evening Conversations — The Cloister Ballroom

4:30–5:15 p.m.

A Conversation with Senator Ted Cruz

Matthew Continetti (Moderator)
Robert Doar (Introduction)

As the Senate looks ahead to the latter half of 2026, including oversight hearings, critical legislation such as the National Defense Authorization Act, annual appropriations, and future nominations, how should senators approach the complex political dynamics with the House and White House to best address pressing policy challenges that directly affect the lives of Americans, the economy, and national security? Join Senator Ted Cruz, chairman of the Senate Commerce Committee and a senior member of the Senate Foreign Relations and Judiciary Committees, for an in-depth look at key policy areas, including the impact of AI on the economy and wider American life, strategic competition with Iran and China, law and the courts, homeland security, and energy policy.

5:15–6:00 p.m.

From New York to Abu Dhabi: Museums at the Forefront of Cultural Renewal

Mariët Westermann
Robert Doar (Introduction)

As CEO of the Solomon R. Guggenheim Museum and Foundation, art historian Mariët Westermann leads a constellation of iconic museums—from New York to Venice, Bilbao, and Abu Dhabi—that combine world-class buildings and art collections with deep engagement in their local communities. In her presentation, Westermann will explore what art contributes to the cultural life of cities and how art museums can spur development and civic renewal around the world.

6:00–7:00 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 — The Cloister

A Conversation with Robert E. Rubin and R. Glenn Hubbard

Michael R. Strain (Moderator)

Robert E. Rubin and R. Glenn Hubbard have been at the center of their parties' economic policy debates for decades. Between them, they have contributed to balancing the federal budget, addressing international currency crises, reforming the tax code, and responding to terrorist attacks. Join them and AEI's Michael R. Strain for a conversation about designing and implementing economic policy at the highest levels of government, working collaboratively and constructively with members of the opposite political party, and understanding the economic and fiscal risks we face at this moment—and the risk that centrist economic policy may be a thing of the past.

Taking Religion Seriously

Catherine Cox
Charles Murray
Ross Douthat (Moderator)

Even a decade ago, American culture seemed to be growing increasingly secular and detached from religion. But something has changed. In his recent book, *Taking Religion Seriously*, AEI's Charles Murray recounts his own path to reconsidering faith and the central role of his wife, Catherine Cox, in that story. AEI's Ross Douthat, whose own most recent book, *Believe: Why Everyone Should Be Religious*, makes the case for religion, will join Murray and Cox in conversation about the place of the sacred in American life.

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The American Revolution

Sarah Botstein
Yuval Levin (Moderator)

Sarah Botstein, a renowned and award-winning documentary filmmaker, has spent the past two decades producing films on various aspects of American history with Ken Burns. She was most recently Burns's coproducer on the six-part PBS miniseries *The American Revolution*. She will discuss the series (and show clips of key moments), the importance of commemorating our history in film, the meaning of America's 250th year, and the documentarian's craft.

Saturday, March 14

7:30–9:30 a.m. Breakfast Available — The Cloister

8:00–9:00 a.m. Early Bird Sessions — The Cloister

A Conversation with Paul Atkins, Chairman of the US Securities and Exchange Commission

Adam J. White (Moderator)

Leading the agency responsible for overseeing America's capital markets and protecting investors, Paul Atkins has been a prominent advocate of market integrity, capital formation, and regulatory restraint. This conversation will explore the Securities and Exchange Commission's role in sustaining economic dynamism, balancing innovation with investor protection, and shaping the future of American capitalism.

Energy Abundance?

Erik Brynjolfsson
Shelley Moore Capito
Mike Dunleavy
Brian P. Kemp
Glenn Youngkin
James Pethokoukis (Moderator)

Energy costs are growing as an important political issue. Elected officials are concerned about AI's energy demands and what they will mean for household energy prices. At the same time, investors and businesses are bullish on AI—provided access to affordable energy does not become a binding constraint. And even apart from AI, energy is a pressing political, economic, and security issue. What is the state of US energy resources? Are policy and regulatory hurdles inhibiting progress toward abundance and affordability? What is the outlook in Congress for permitting reform?

9:30–10:30 a.m. Breakout Sessions — The Cloister

Affordability for Families and Federal Fiscal Responsibility

Mike Carey
Josh Gottheimer
Mike Lee
Kevin Stitt
Alex Brill (Moderator)

Affordability is expected to be a dominant theme throughout 2026, as policymakers in both parties respond to constituents unhappy with the high cost of goods like housing, energy, and health care; at the same time, federal policy in those same sectors makes it harder for people to rise and businesses to succeed and pushes federal deficits toward record highs. Will the One Big Beautiful Bill Act deliver on promises to grow the economy and rein in spending? What more needs to be done in permitting reform, housing supply reform, health care, and other issues? What must Congress tackle, and what must be left to the states?

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China: The State of the Competition

Michael Beckley
Jason Furman
John Moolenaar
Dan Sullivan
Liza Tobin
Dan Blumenthal (Moderator)

From supply-chain coercion to techno-industrial competition to eroding American deterrence in the western Pacific, the Sino-American rivalry is defining geopolitics in our time. Washington and Beijing are locked in a long-term existential struggle over which country will lead the international system. Yet President Trump has called for a "tactical truce" with Beijing that has resulted in looser American technology restrictions and reduced pressure on China. Will the US gain anything from this approach? What is the right strategy to secure a strategic advantage over Beijing? This panel on the state of the competition with China will explore the rivalry in all its dimensions.

The Supreme Court in a High-Paced Legal Moment

Paul Clement
Elizabeth Prelogar
Eugene Scalia
Adam J. White
Sarah Isgur (Moderator)

The Supreme Court's current term has not only featured some enormously important cases but also subjected the Court to a turbocharged pace of urgent litigation. This panel of experienced Supreme Court observers and litigators will consider how the Court has responded to that challenge and where this term's biggest cases might be headed.

10:45–11:45 a.m. Morning Conversation — The Cloister Ballroom

A Conversation with Mehmet Oz, Administrator for the Centers for Medicare & Medicaid Services, and Jay Bhattacharya, Director of the National Institutes of Health of the United States and Acting Director of the Centers for Disease Control and Prevention

Scott Gottlieb (Moderator)

President Trump took office with an ambitious vision to address failures in the federal health bureaucracy, from poor care and spiraling costs to the breakdown of scientific expertise during COVID. As Centers for Medicare & Medicaid Services administrator, Mehmet Oz has spearheaded efforts to find savings and improve outcomes in America's health care entitlements. National Institutes of Health Director and Centers for Disease Control and Prevention Acting Director Jay Bhattacharya is rethinking how the federal government encourages health sciences innovation. How is new leadership transforming these inertia-driven federal agencies? Join former Food and Drug Administration Commissioner Scott Gottlieb for a conversation about the administration's vision for American health policy.

12:00–1:30 p.m. Luncheon — The Beach Club

A Conversation with Rahm Emanuel

Jacqui Heinrich (Moderator)

Rahm Emanuel's breadth of experience knows few parallels among contemporary politicians: He has been a congressman, White House chief of staff, mayor of Chicago, and ambassador to Japan. From his time as a senior adviser to President Bill Clinton to his service as a top diplomat in the Biden administration, Emanuel has seen the parties evolve and policy redefined. However, as today's leaders struggle to find their footing on a range of issues, where should policymakers go from here to address today's most pressing challenges?

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1:45–3:00/3:30 p.m. Afternoon Sessions — The Cloister and Rainbow Island*

Cities: Opportunities and Potential: A Conversation with Mike Duggan, Former Mayor of Detroit

Robert Doar (Moderator)

When Mike Duggan stepped in as mayor of Detroit in 2014, the city was emerging from bankruptcy and facing deep challenges. Over more than a decade in office, Duggan strengthened Detroit's economic base, stabilized neighborhoods, reduced crime, and restored public services, transforming the city into a place people once again choose to live and invest in. As American cities today struggle with fiscal constraints, public safety, and affordability, Duggan's experience offers accomplished, practical insight into how to unleash the potential of America's cities. Join AEI President Robert Doar for a conversation with Duggan on the lessons Detroit's turnaround holds for the rest of the country.

The Renewal of Civics Education

Paul Carrese
Louise Dubé
Benjamin Storey
Hans Zeiger
Yuval Levin (Moderator)

The 250th anniversary of the American founding offers an opportunity to strengthen civics in American education, from elementary school through college. And there is plainly renewed openness to civics on all sides of our politics, even if it is not always understood and expressed in quite the same way. Leading figures in this movement will consider what would be required for the revitalization of civics to succeed.

Ukraine's Defense Innovation and Drone Demonstration*

Rainbow Island

** Shuttles will depart from 1:30 to 1:45 p.m. from the Beach Club and the Cloister for Rainbow Island. The session and demonstration will conclude at 3:30 p.m. Shuttles will return to the Cloister and Beach Club thereafter.*

Alex Fink
Pavlo Horiachev
Oleksandr Kamyshin
Nataliya Bugayova (Co-Moderator)
Kimberly Kagan (Co-Moderator)
Joseph Gagnard (Demonstrator)

AEI and the Institute for the Study of War (ISW) will host a discussion on Ukraine's exceptional wartime innovation and its relevance for the United States' ability to prepare to deter conflict and win future wars. ISW President Kimberly Kagan and ISW Modern Warfare Fellow Nataliya Bugayova will moderate a discussion with Ukraine's top innovators and Oleksandr Kamyshin, strategic adviser to Ukraine's president and formerly Ukraine's minister of strategic industries, who has transformed and scaled Ukraine's defense production during Russia's full-scale invasion. A live demonstration of Ukraine's cutting-edge, battle-proven drone capabilities will follow the discussion.

3:00/3:30–4:45 p.m. Afternoon Break

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4:45–6:15 p.m. Evening Conversations — The Cloister Ballroom

4:45–5:15 p.m.

A Conversation with Crown Prince Reza Pahlavi

Danielle Pletka (Moderator)

In January, the Islamic Republic faced its most precarious moment in decades, and the world was horrified to learn the lengths the regime would take to hold onto power. Following the brutal suppression of the protests and the murder of 32,000 innocent Iranians, join AEI's Danielle Pletka and Crown Prince Reza Pahlavi, the son of the former shah of Iran, to examine the widening cracks in state loyalty, the looming power vacuum in Iran amid Ayatollah Ali Khamenei's death, and what steps the United States can take to hasten the end of the Islamic Republic and ensure a brighter and free future for the Iranian people.

5:15–6:15 p.m.

The United States and Its Allies in a More Dangerous World

Michael Beckley
Christopher Cavoli
Roger F. Wicker
Kori Schake (Moderator)

The US has long relied on close relationships with allies to sustain a peaceful and prosperous international order. But disputes over trade policy, the defense of Ukraine, China's rising threat, and burden sharing have unsettled America's strategic posture. How can the free world best cooperate to advance shared interests and values? As President Trump weighs a major defense spending increase, what investments could best strengthen capabilities and deter adversaries? Join former Supreme Allied Commander Europe Christopher Cavoli, Senator Roger F. Wicker, and AEI's Michael Beckley for a conversation on the present and future of global security.

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.

6:15–7:00 p.m. Reception — The Cloister

7:15–8:30 p.m. Dinner — The Cloister

8:30–10:45 p.m. Post-Dinner Reception — The Cloister

8:45–9:45 p.m. Starlight Chats — The Cloister

Israel on Trial: Examining the History, the Evidence, and the Law

Roy K. Altman
Danielle Pletka (Introduction)

In the halls of the United Nations and the International Criminal Court, Israel and its leaders face accusations of the worst kind of crimes against humanity. In his forthcoming book, *Israel on Trial: Examining the History, the Evidence, and the Law*, Judge Roy K. Altman brings courtroom rigor to an examination of these claims. Join Judge Altman as he sifts fact from fiction in Israel's conduct of the war against Hamas.

Mind Games: Cognitive Warfare Against the West

Nataliya Bugayova
Frederick W. Kagan
Christopher A. Wray
Rob Portman (Moderator)

US adversaries are weaponizing the openness of the US and our allies to shape our perceptions of the world to their advantage. Their cognitive warfare efforts aim to distort our sense of reality so that our leaders and the public willingly choose policies that harm ourselves and help our enemies achieve their goals. And they are already finding success. To defend ourselves against this threat, we must first understand it. Join former FBI Director Christopher A. Wray and other experts for an introduction and assessment of how the free world can respond.

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The Revolution Will Be Group-Chatted

Jonah Goldberg
Yuval Levin (Introduction)

The United States, like all liberal democracies, is built on a system of formal rules and procedures. But the United States, like all nations, functions thanks to an informal system of networks, connections, and associations. What happens when the informal system overpowers the formal? Drawing on the thought of Alexis de Tocqueville, C. S. Lewis, William James, H. G. Wells, Don Vito Corleone, and others, Jonah Goldberg previews the next chapter of American dysfunction—or renewal.

Sunday, March 15

7:30–10:15 a.m.	Breakfast Available	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.*

9:00–10:15 a.m. Early Bird Sessions — The Cloister

How Can Congress Be Relevant Again?

Katie Britt
Mike Carey
Jim Himes
Jimmy Panetta
Luke Strange (Moderator)

In 2025, Republicans used budget reconciliation under united control of Congress to pass President Trump's One Big Beautiful Bill Act and afterward went through the longest government shutdown in history. While some members see last year as a productive agenda in action, others have questioned whether Congress is organized in a way to allow members to legislate effectively. What institutional factors account for the way the 119th Congress has played out so far, and what do members want to see changed? We will look from the varying perspectives of the panelists at how the institution is handling pressures both inside and outside the chamber.

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

Frederick W. Kagan
Kimberly Kagan

As President Trump weighs continued military operations against Iran, what is the situation on the ground? Are airstrikes enough to topple the regime? How is the ongoing US cooperation with Israel, the Gulf states, and Western partners shaping the conflict, and what are the long-term ramifications of a continued US campaign? And as news about Iran dominates the media space, what is happening in Ukraine? What lessons should the US and allies in the Middle East learn from Ukraine's years of experience defending against missile and drone strike packages? Where did the last round of negotiations leave us in the peace process? Join Frederick W. Kagan and Kimberly Kagan for a conversation on key lessons and strategic inflections from Iran and Ukraine.

10:15 a.m.	Senator Mike Lee and Mrs. Sharon Lee Depart Sea Island for Jacksonville Airport	Ground transportation
1:15-3:16 p.m.	**Senator Mike Lee and Mrs. Sharon Lee; AA5296, JAX-DCA**	

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SPEAKERS

ROY K. ALTMAN	US District Court Judge, US District Court for the Southern District of Florida
PAUL ATKINS	Chairman, US Securities and Exchange Commission
AMI BERA	US House of Representatives (D-CA)
JAY BHATTACHARYA	Director, US National Institutes of Health/Acting Director, Centers for Disease Control and Prevention
SARAH BOTSTEIN	Director and Producer, Florentine Films
RACHEL L. BRAND	Board Member, Walmax/Board Member, PhonePe/Former Executive Vice President and Chief Legal Officer, Walmart
STEVE BRIERLEY	CEO and Founder, Riverlane
KATIE BRITT	US Senate (R-AL)
CHRISTIAN BROSE	President and Chief Strategy Officer, Anduril
ERIK BRYNJOLFSSON	Professor, Stanford University
NATALIYA BUGAYOVA	Director, Cognitive Warfare Project/Modern Warfare Fellow, Institute for the Study of War
SHELLEY MOORE CAPITO	US Senate (R-WV)
MIKE CAREY	US House of Representatives (R-OH)
PAUL CARRESE	Professor, Arizona State University/Jack Miller Center
BUDDY CARTER	US House of Representatives (R-GA)
CHRISTOPHER CAVOLI	General (retired)/Partner, Valor Equity Partners
PAUL CLEMENT	Partner, Clement & Murphy
CATHERINE COX	Author and Editor, Cox and Murray Inc.
MICHAEL CROW	President, Arizona State University
TED CRUZ	US Senate (R-TX)
JAMIE DIMON	Chairman and CEO, JPMorganChase
LOUISE DUBÉ	CEO, iCivics
MIKE DUGGAN	Former Mayor of Detroit
MIKE DUNLEAVY	Governor of Alaska
RAHM EMANUEL	Former Ambassador to Japan
ALEX FINK	President and US CEO, Swarmer
DEB FISCHER	US Senate (R-NE)
JASON FURMAN	Aetna Professor of the Practice of Economic Policy, Harvard University
JOSEPH GAGNARD	Director of Field Operations, Swarmer
ALAN M. GARBER	President, Harvard University
GITA GOPINATH	Gregory and Ania Coffey Professor of Economics, Harvard University
JOSH GOTTHEIMER	US House of Representatives (D-NJ)
JAN HATZIUS	Chief Economist and Head of Global Investment Research, Goldman Sachs
JACQUI HEINRICH	Senior White House Correspondent, Fox News Channel/ Host, *The Sunday Briefing*
JIM HIMES	US House of Representatives (D-CT)
PAVLO HORIACHEV	Engineering Expert, Dignitas Ukraine
WILLIAM INBODEN	Executive Vice President and Provost, University of Texas at Austin
SARAH ISGUR	Editor, *SCOTUSblog*
KIMBERLY KAGAN	President and Founder, Institute for the Study of War

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OLEKSANDR KAMYSHIN	Adviser to the President of Ukraine
BRIAN P. KEMP	Governor of Georgia
FRANCES LEE	Professor of Politics and Public Affairs, Princeton University
MIKE LEE	US Senate (R-UT)
YECHIEL LEITER	Israel's Ambassador to the United States
JAMES LITINSKY	Founder, Chairman, and CEO, MP Materials
EDWARD LUCE	US National Editor and Columnist, *Financial Times*
STEPHEN MACEDO	Laurance S. Rockefeller Professor of Politics, Princeton University
JIM MATTIS	General (retired)
BRENT J. MCINTOSH	Chief Legal Officer and Corporate Secretary, Citigroup Inc.
LINDA MCMAHON	Secretary of Education, US Department of Education
JOHN MOOLENAAR	US House of Representatives (R-MI)
BLAKE MOORE	US House of Representatives (R-UT)
MEHMET OZ	Administrator, Centers for Medicare & Medicaid Services
REZA PAHLAVI	Exiled Crown Prince of Iran
TOMÁS PALACIOS	Clarence J. LeBel Professor and Director of Microsystems Technology Laboratories, Massachusetts Institute of Technology
JIMMY PANETTA	US House of Representatives (D-CA)
ELIZABETH PRELOGAR	Partner and Chair of Supreme Court and Appellate Practice, Cooley LLP
KRISHNA RANGASAYEE	Founder and CEO, SiMa.ai
DAVID M. RUBENSTEIN	Cofounder and Co-Chairman, Carlyle Group
ROBERT E. RUBIN	Senior Counselor, Centerview Partners
EUGENE SCALIA	Partner, Gibson, Dunn & Crutcher LLP
JASON SMITH	US House of Representatives (R-MO)
KEVIN STITT	Governor of Oklahoma
DAN SULLIVAN	US Senate (R-AK)
JIM TAICLET	Chairman, President, and CEO, Lockheed Martin
JEFFREY TAYLOR	Vice President, General Counsel, and Secretary, Exxon Mobil Corporation
LIZA TOBIN	Managing Director, Garnaut Global
KENT WALKER	President of Global Affairs, Google and Alphabet
MARIËT WESTERMANN	Director and CEO, Solomon R. Guggenheim Museum and Foundation
ROGER F. WICKER	US Senate (R-MS)
SETH WICKERSHAM	Senior Writer, ESPN/*New York Times* Bestselling Author
CHRISTOPHER A. WRAY	Distinguished Visiting Fellow, Hoover Institution/Former Director, FBI
GLENN YOUNGKIN	Former Governor of Virginia
MARK ZANDI	Chief Economist, Moody's Analytics
HANS ZEIGER	President, Jack Miller Center

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ATTENDEES

MICHAEL ALLEN	Beacon Global Strategies
NANCY & PHILIP ANSCHUTZ	The Anschutz Corporation
LAUREL & CLIFFORD ASNESS	AQR Capital Management LLC
SUSAN & BRYAN BAILEY	Crow Holdings Capital/Dalfort Capital Partners
NANCY S. LEE & JOSHUA G. BEDELL	NYU Langone Health/TransUnion
BETSY & THILO BEST	Betsy Best Interiors/Bayshore Retirement Partners
LUCY & HENRY BILLINGSLEY	Billingsley Company
ELIZABETH K. & FRANCIS S. BLAKE	Pine Needles Investments
BARBARA STEWART & PETER BOWE	Bowe Stewart Foundation
DICK BOYCE	The Boyce Family Office
ANGELA & DOUG BRALY	The Braly Group LLC/Leading Properties
BLACKFORD F. BRAUER	Hunter Engineering Co.
BROOKS BURGUM	LongWater
DIANA & ERIC CANTOR	Alternative Investment Management LLC/Moelis & Company
JACOB CARNEY	Castle Hook Partners
DAN T. CATHY	Chick-fil-A/Trilith
RICHARD CHIN	New York Life Insurance Investors
MARY & ARMEANE M. CHOKSI	Omnicom/Johns Hopkins Medicine, Brady Urological Institute
MARY PAT & CHRIS CHRISTIE	Christie 55 Solutions/55th Governor of New Jersey
EDWARD CONARD	Adjunct Fellow, American Enterprise Institute
MARILYN E. & PETER H. COORS	Center for Bioethics and Humanities at the University of Colorado Anschutz Medical Campus/Molson Coors Beverage Company
KATHY & HARLAN CROW	Crow Holdings
MACKENZIE & JACK CROW	Shoal Creek Capital
BOYKIN CURRY	Eagle Capital Management LLC
RAVENEL CURRY	Eagle Capital Management LLC
MARK F. DALTON	Tudor Investment Corporation
DANIEL A. D'ANIELLO	Carlyle Group
STEVE DELBIANCO	NetChoice
KIM DENNIS & TRACY BROWN	DonorsTrust
BETSY & DICK DEVOS	11th US Secretary of Education/The Windquest Group
JUDY & JOHN DONOVAN	Qudit
BRITTANY & KURT DUDAS	University of Florida
JULIA HARRIS & BEHDAD EGHBALI	Clearlake Capital Group
JOEL S. EHRENKRANZ	Ehrenkranz Partners
MARTIN C. ELTRICH III	AEA Investors LP
AARON ENRICO	Black Bear Partners
HEATH & JOHN V. FARACI	International Paper
ELIZABETH & TROY FOWLER	Triad Foundation Inc.
JAMIE FREELAND	Byzantine Maritime Corporation
BETH & JOSHUA S. FRIEDMAN	Inher Circle LLC/Canyon Partners LLC
ELISE & TULLY FRIEDMAN	FFL Partners LLC (retired)
MICHAEL GEARON	28th Street Ventures
BRETT GERRY	The Boeing Company

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JODY GESSOW	DivcoWest Real Estate Services Inc.
ANN GIBBS	
JENNIFER L. & MICHAEL W. GLEBA	Sarah Scaife Foundation
HARVEY GOLUB	American Express
NOAH GOLUB	New York University
TIFFANY HU & ROB GRANIERI	Jane Street Capital LLC
GILLIAN MACLEAN GROWDON	MacLean Investment Partners
STEW GROWDON	Northeastern University
SALLY & FRANK HANNA	Hanna Capital LLC
YVONNE & KENNETH H. HANNAN JR.	Colonial Navigation Co. Inc.
TAYLOR BERRY & DAVE HANSON	Tennessee State Collaborative on Reforming Education/ Green Hills Partners
KATHRYN D. & RAYMOND J. HARBERT	Raymond J. and Kathryn D. Harbert Foundation/ Harbert Management Corporation
WILLIAM E. HASLAM	HF Capital LLC
ANNE G. & PETER HENNESSY	Hennessy Automobile Companies
REGEN HORCHOW & KEN HERSH	The Hersh Foundation/HFI Capital Management
TRACI & HAMILTON HILL	Renewal Physical Therapy/Bartlit Beck LLP
JANINE & J. TOMILSON HILL	Council on Foreign Relations (retired)/The Hill Family Office
ANN V. & H. LEE S. HOBSON	Highside Capital Management
DOUGLAS JEFFERSON HSU	Far Eastern Group
MARY MORRIS HSU	Far Eastern Group
NICOLE HSU	Far Eastern Group
KATHY & AL HUBBARD	E&A Companies
BOB HUGIN	Twelfth Street Partners
ANURAG JAIN	Perot Jain
LARSEN JAY	Knox County Government (Tennessee)
NANCY DUNLAP JOHNS & JOHN D. JOHNS	University of Alabama at Birmingham/ Protective Life Corporation (retired)
ROBIN GILLEN & HARVEY JONES	Square Wave Ventures
JODY JONSSON	Capital Group
MITCH JULIS	Canyon Partners LLC
SUSAN KASSER	Neuberger Berman
MARCIE & WILL KINZEL	Kylemore Strategies/Carlyle Group
JACKIE & ANDREW KLABER	Rockefeller Capital Management/Bedford Ridge Capital
RODGER KROUSE	Sun Capital Partners Inc.
WILLIAM KROUSE	
ELIZABETH & STEVEN LAW	Law Family Office/Credence
PHILIP LEBHERZ	Point Care
EVAN LEPATNER	Courizon Partners
BARRY MACLEAN	MacLean-Fogg Company
RICHARD MAGNUSON	GI Partners
SANDRA OURUSOFF MASSEY & M. HOLT MASSEY	M. H. Massey & Co. LLC
MARY & ROBERT MCCORMACK	Granite Capital Management

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LYDIA COTTRELL & WALTER MCCORMACK	GMO/Granite Capital Management
SHANNON & DON MCGAHN	National Association of Realtors/Jones Day
MICHAEL MCKINNON	Artisan Partners
DREW MCKNIGHT	Fortress Investment Group
BILLIE & ROSS MCKNIGHT	Olney Bancshares of Texas
THOMAS F. MCWILLIAMS	Private Investor
MEREDITH & JONATHAN MEEKS	TA Associates
KEN MEHLMAN	KKR
MICHELLE MESACK	JPMorganChase
JUDITH B. MILLER	JPMorganChase
MARY & ROBERT S. MURLEY	UBS
DIANE & FRANK W. MURPHY III	FW Murphy Family Foundation/Genisys Controls
ANDREA & VIPIN NAMBIAR	HN Capital Partners
CHARLENE & PATRICK NEAL	Neal Communities
JENNIFER G. NEWSTEAD	Apple
MINA NGUYEN & JASON JAGGARD	Geneses Capital Management/Novus Global
VIRGINIA & WILLY NUNN	Star View Advisors/Homes by WestBay
KATHLEEN & KEVIN J. O'CONNOR	AQR/Asness Family Foundation/Lockheed Martin
RICHARD R. ONG	Eagle Capital Management LLC
AMY & ZACHARY J. PACK	BDT & MSD Partners
PENNY & G. RUFFNER PAGE JR.	O'Neal Industries
ADEN PAVKOV	Goldman Sachs
NANCY JACOBSON PENN & MARK PENN	No Labels/Stagwell Group
RUSSELL P. PENNOYER	Achelis & Bodman Foundation
SARAH & ROSS PEROT JR.	Sarah and Ross Perot Jr. Foundation/Hillwood
DONALD QUINTIN	Lone Star Funds
ANNE & ROBERT RAYMOND	Crow Holdings/Raymond Design LP
PHOEBE SCOTT REAUMOND	Scott Family Foundation
GEOFFREY REHNERT	Audax Group
LAURA C. & ROBERT L. REYNOLDS	Great-West Lifeco US
RICHARD ROEDER	Cherry Hill Investments
LISA & MATTHEW ROSE	The Gatehouse/BNSF Railway Company (retired)
SALLY & ED RUST	State Farm
NATHAN E. SAINT-AMAND	
CODIE SANCHEZ & CHRISTOPHER PETKAS	Contrarian Thinking
IAN SCHAAD	Jane Street Capital LLC
PETER SCHER	JPMorganChase
ANNE SCOTT	Town of Jupiter Island, Florida
MARY & DOUG SCRIVNER	Jane Street Capital LLC
DAN SETZMAN	
YUKO WATANABE SHAH & RAJ M. SHAH	I Squared Capital/Shield Capital

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RACHEL & PAUL SHERIDAN	Kirkland & Ellis/Latham & Watkins
DANNA & ALEX SLUSKY	Vector Capital
DIANE & THOMAS W. SMITH	Prescott Investors Inc.
JILL & MIKE SOMMERS	American Petroleum Institute
ALEX STAFILOPATIS	Byzantine Maritime Corporation
MARIN STRMECKI	Smith Richardson Foundation
ROBIN & ALEXANDER D. STUART	North Star Investments
MARC SUMERLIN	Evenflow Macro
BARBARA & WILSON H. TAYLOR	Cigna
MARILYNN & CARL THOMA	Thoma Foundation/Thoma Bravo
GWENDOLYN VAN PAASSCHEN	John Brookes-Denmans Foundation
CECILIA GREENE & PAUL VERBINNEN	Partnership Schools/FGS Global
JANET A. & CHRISTOPHER P. VINCZE	TRC Companies Inc.
ECKART VON KLAEDEN	Mercedes-Benz Group AG
SARAH H. KETTERER & ALAN VORWALD	Causeway Capital Management LLC/Morgan Stanley
EDGAR WACHENHEIM III	Greenhaven Associates Inc.
DORI & BILL WALTON	Rockpoint Group LLC
AMY & LES WARE	Marconi
COURTNEY BENSE WEATHERFORD & WILL WEATHERFORD	Weatherford Capital
CHELSEA RENNHOFF & GILES WHITING	C^2 Ventures/Decisions
JEANNE WINSTON	
DANIEL YERGIN	S&P Global
ROBIN & MIKE ZAFIROVSKI	The Zaf Group

AEI SCHOLARS AND MANAGEMENT

STEPHANIE ADLER	Director, Individual Giving
MICHAEL BECKLEY	Nonresident Senior Fellow
JASON BERTSCH	Executive Vice President
DAN BLUMENTHAL	Senior Fellow
HAL BRANDS	Senior Fellow
ALEX BRILL	Senior Fellow
MATTHEW CONTINETTI	Senior Fellow; Director, Domestic Policy Studies; Patrick and Charlene Neal Chair in American Prosperity
ROBERT DOAR	President
ROSS DOUTHAT	Nonresident Fellow
MACKENZIE EAGLEN	Senior Fellow
NICHOLAS EBERSTADT	Henry Wendt Chair in Political Economy
JONAH GOLDBERG	Senior Fellow; Asness Chair in Applied Liberty
JACK GOLDSMITH	Nonresident Senior Fellow
SCOTT GOTTLIEB	Senior Fellow
PHIL GRAMM	Nonresident Senior Fellow
FREDERICK M. HESS	Senior Fellow; Director, Education Policy Studies
R. GLENN HUBBARD	Nonresident Senior Fellow

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MARGARET IVY	Chief of Staff, Executive Office
FREDERICK W. KAGAN	Senior Fellow; Director, Critical Threats Project
YUVAL LEVIN	Senior Fellow; Director, Social, Cultural, and Constitutional Studies; Beth and Ravenel Curry Chair in Public Policy; Editor in Chief, *National Affairs*
LEIGH MCAFEE	Vice President, Development
SEAN MCGILLEY	Managing Director, Corporate Relations
CHRIS MILLER	Nonresident Senior Fellow
CHARLES MURRAY	F. A. Hayek Chair Emeritus in Cultural Studies
JAMES PETHOKOUKIS	Senior Fellow; Editor, *AEIdeas*; DeWitt Wallace Chair
DANIELLE PLETKA	Distinguished Senior Fellow
ROB PORTMAN	Distinguished Visiting Fellow in the Practice of Public Policy
KORI SCHAKE	Senior Fellow; Director, Foreign and Defense Policy Studies
COURTNEY SCHWARTZ	Managing Director, Foundation Relations and Donor Communications
ANGELA STENT	Senior Fellow
BENJAMIN STOREY	Senior Fellow; Ravenel Curry Chair in Civic Thought; Codirector, Center for the Future of the American University
JENNA SILBER STOREY	Senior Fellow; Ravenel Curry Chair in Civic Thought; Codirector, Center for the Future of the American University
MICHAEL R. STRAIN	Senior Fellow; Director, Economic Policy Studies; Paul F. Oreffice Chair in Political Economy
LUKE STRANGE	Vice President, Government Relations
MARC A. THIESSEN	Senior Fellow
ADAM J. WHITE	Senior Fellow; Laurence H. Silberman Chair in Constitutional Governance

SPEAKER GUESTS

JANINE BERA	Wellspace Health
JENNIFER BLUMENTHAL	
WESLEY BRITT	
CHARLES CAPITO	United Bankshares Inc.
MEGHAN CONRAD CAREY	City Park Interiors
AMY CARTER	
ALEXANDRA CLEMENT	
JONATHAN F. COHN	Lehotsky Keller Cohn LLP
HEIDI CRUZ	Goldman Sachs
IQBAL DHALIWAL	Abdul Latif Jameel Poverty Action Lab
SARA DOAR	
ABIGAIL DOUTHAT	
SONIA HASSAN DUGGAN	Wayne State University
MARY EBERSTADT	Faith and Reason Institute
JESSICA GAVORA	
WENDY GRAMM	
MARY SCOTT HIMES	
CONSTANCE POND HUBBARD	
RANA SIU INBODEN	Strauss Center, University of Texas

DRAFT

SCOTT KELLER	Lehotsky Keller Cohn LLP
MARTY KEMP	First Lady of Georgia
NIAMH KING	Aspen Strategy Group
LINDA-ELING LEE	MSCI
SHARON LEE	
DANIELLE LITINSKY	
LAURA AHN MCINTOSH	Wachtell, Lipton, Rosen & Katz
HENRY MISHKIN	
CARRIE PANETTA	Superior Court of Monterey County
JANE PORTMAN	
LAURA STRANGE	
PAM THIESSEN	theGROUP
GAYLE WICKER	
LESLIE WILLIAMS	
MARK WOOTERS	Cushman & Wakefield
SUZANNE S. YOUNGKIN	Commonwealth of Virginia
BILL ZANDI	Intelligent Analytics

DRAFT

Enterprise Club Retreat at Sea Island Participants

AEI STAFF AND EXECUTIVES

STEPHANIE ADLER
Director, Individual Giving

JASON BERTSCH
Executive Vice President

REBECCA GOOD
Managing Director, Outreach

LEIGH MCAFEE
Vice President, Development

SEAN MCGILLEY
Managing Director, Corporate Relations

LIBBY POLAND
Manager, Individual Giving

COURTNEY SCHWARTZ
Managing Director, Foundation Relations and Donor Communications

LUKE STRANGE
Vice President, Government Relations

PARTICIPANTS

ALLISON ALLEN
Allison Allen Design

BEAU ALLEN
Broadlands Holdings

LENA BELL
The Wall Street Journal

ADAM BLUM
Old Hickory Partners

STEPH CARLTON
Centers for Medicare & Medicaid Services

JACK CROW
Shoal Creek Capital

MACKENZIE CROW

SARAH CROW
Blackstone

GARNETT DECOSIMO
Decosimo Corporate Finance

PATRICK DILLINGHAM
Watchfire Ventures

JT GAGE
Malouf Nakos Jackson & Swinson

MELINDA POUCHER GAGE
Gibson Dunn

LUIS GAZITUA
Gazitua Letelier PA

PATRICK GEORGE
Beachwood Ventures

JOSHUA GREGG
Double Eagle Energy

MERRILL GREGG
Texas Parks and Wildlife Foundation

CLAY HOLLIS
Tucker/Hall

LEANNA HOLLIS
Family First

SEAN KOFFEL
Watchfire Ventures

ANTONIA PRYOR LEAVITT
University of Miami Health System

WILLIAM C. LEAVITT
J. J. Taylor Companies

JACK LINDSLEY
DalFort Capital Partners

PETER LODI
Dyne Ventures

KELLY LOMBARDI
KML Consulting

MARK LOMBARDI
Thyme Care

BART LOMONT
Hallador

NATALIE LOMONT
Office of George W. Bush

JONATHAN MCCONNELL
Meridian

MARY MCCONNELL
Meridian

JULIA METCALFE
Quiet Capital

JACK MOSBACHER
Watchfire Ventures

WILL MURPHY
Tiehack Capital Partners

AMANDA ORR
Amanda Orr Architects

E. WYCLIFFE ORR JR.
Battle Investment Group

DRAFT

Enterprise Club Retreat at Sea Island Participants *(Continued)*

ERIC G. OSBORNE
Sherrard Roe Voigt & Harbison

WREDE PETERSMEYER
Overmatch VC

KIMBLE RATLIFF
Themata Holdings

TYLER SCHAAD
JLL

DANIEL SCHWARTZ
American Health Associates

TRACY SCHWARTZ
LSN Partners

THEODORE SHIN
Capitol Hill Group

BEN SIEGEL
Bleecker Partners

ELOISE A. UGHETTA
Investment Banking

PAUL VRONSKY
BOND

BLAISE WARREN
Invesco

SARAH HAWKINS WARREN
Supreme Court of Georgia

DAN WEST
SCF Partners

ISABEL EBERSTADT WEST
SAHM

BEN WIDLANSKI
Kozyak Tropin & Throckmorton LLP

BRAD WILSON
Crow Holdings

BROOKE WILSON
Winston & Strawn LLP

ADAM WITTY
Forbes Books

ERIN WITTY
Forbes Books

ALICYN YORK
Allora Creative Co.

DRAFT

DRAFT

If you have any questions regarding the World Forum during your stay, please contact the World Forum Office.

Hours: March 12–14, 7:00 a.m. to 9:45 p.m.;
March 15, 7:00 a.m. to 12:00 p.m.

Phone: 202-419-5290

Email: worldforum@aei.org

Sea Island®

AEI WORLD FORUM | SEA ISLAND, GA

September 18, 2025

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 12-15, 2026, 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 world leaders grappling with the most critical policy issues of the day. Every year, we convene a group of some of the most influential figures in 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 2025, among our featured speakers were Alex Karp, Lawrence Culp, Jonathan Haidt, Eva Moskowitz, Interior Secretary Doug Burgum, 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 2026 program agenda as it takes shape.

With warm regards,

Robert Doar
President
American Enterprise Institute

Enclosures

AEI

WORLD FORUM

SEA ISLAND, GEORGIA

MARCH 12–15, 2026

2026 AEI WORLD FORUM



AEI's 2026 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 and private meetings. Spouses and significant others are encouraged to attend and participate in the Forum's discussions.

The 2026 World Forum agenda is currently in development. As an example, the 2025 agenda and participant list follow.

Sea Island

From March 12 to 15, 2026, 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.

Sea Island is only minutes from McKinnon St. Simons Island Airport, which services private aircraft.

Sea Island is located halfway between Savannah, Georgia, and Jacksonville, Florida, and is approximately a one-hour drive from both cities' international airports.

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

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Thursday, March 13

All Day	Registration	Colonial Lounge
3:00–4:15 p.m.	Book Seminars (Optional)	The Cloister

The Fate of the Day: The War for America, Fort Ticonderoga to Charleston, 1777–1780

Rick Atkinson
Aaron MacLean (Moderator)
Robert Doar (Introduction)

The year 2025 marks the 250th anniversary of the start of the American Revolution. An essential part of the story of our nation's founding is our improbable military triumph against Britain. Pulitzer Prize–winning historian Rick Atkinson has been studying this conflict for years, and the second book in his Revolution Trilogy, *The Fate of the Day: The War for America, Fort Ticonderoga to Charleston, 1777–1780*, comes out this spring. Please join him for a seminar on this new book, covering the middle years of the war, including the Battle of Saratoga, Valley Forge, and France's entry. Mr. Atkinson's powerful narrative adds new dimensions to the people and events that won our nation its independence.

Tides of Fortune: The Rise and Decline of Great Militaries

Zack Cooper
Kori Schake (Introduction)

Zack Cooper will discuss his recently released book, *Tides of Fortune: The Rise and Decline of Great Militaries*, from Yale University Press. Drawing on a decade of research and his experience at the White House and the Pentagon, Dr. Cooper outlines a novel explanation for how militaries change as they rise and decline. For centuries, the world's most powerful militaries have adhered to a remarkably consistent pattern of behavior. His book tracks the paths of the six great powers of the 20th century and argues that the American and Chinese militaries are following the same well-trodden path. To get on the right side of history, the United States must change course, and quickly.

5:00–6:00 p.m.	Reception	The Beach Club
6:00–6:10 p.m.	**Welcome Remarks** Daniel A. D'Aniello Robert Doar	The Beach Club
6:10–7:15 p.m.	Opening Conversation **Leadership in the States** Brian P. Kemp Kevin Stitt Ramesh Ponnuru (Moderator)	The Beach Club

Each day, America's governors act as salespeople for their state, negotiators with a legislature, advocates to Washington and the world, responders to disasters, and leaders of an executive branch. With these powers and responsibilities, they must steer their states to balance a budget, grow their economy, educate their youth, provide for public safety, and navigate energy and technological transitions that will upend how their predecessors have done all these things. Please join AEI's Ramesh Ponnuru as he welcomes Georgia Governor Brian P. Kemp and Oklahoma Governor Kevin Stitt for a conversation in their leadership in their states.

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7:15–8:30 p.m.	Dinner	The Beach Club
8:30–9:30 p.m.	Evening Conversation	The Beach Club

A Conversation with House Ways and Means Chairman Jason Smith

David M. Rubenstein (Moderator)

The year 2025 is crucial for tax policy, as the expiration of provisions of the 2017 Tax Cuts and Jobs Act, including individual rate cuts, provides an opportunity to extend and expand fiscally responsible pro-growth tax reform. As chairman of the House Ways and Means Committee, Jason Smith is the chief tax writer for House Republicans and one of the most influential players in crafting both the substance and political strategy of this legislation. What are Republicans' top priorities, and how will they navigate their narrow majority and differences between the House and Senate? Join Chairman Smith for a conversation about the opportunities and challenges of tax reform in 2025.

8:30–10:15 p.m.	Post-Dinner Reception	Spanish Lounge

Friday, March 14

7:30–9:30 a.m.	Breakfast Available	The Cloister
8:00–9:00 a.m.	Early Bird Sessions	The Cloister

China's Foreign Influence Operations

John Moolenaar
Derek Scissors
Brandon Wales
Yaqiu (Rachel) Wang
Audrye Wong (Moderator)

How is the Chinese Communist Party trying to manipulate ethnic Chinese communities in the United States and elsewhere? What are the implications of recent Chinese hacking attempts on US infrastructure and telecommunications? To what extent have multinational corporations fallen under the sway of the Chinese government's demands? And how is the US government responding to China's wide-ranging influence attempts? This panel will examine the multifaceted nature of Beijing's political interference and foreign influence activities and assess the threats to US national security and the health of liberal democracies.

How to Understand Gen Z

Kristen Soltis Anderson
Daniel A. Cox
Ramesh Ponnuru (Moderator)

The young are always a mystery to their elders, but today's young Americans seem to be living exceptionally different lives than their parents and grandparents did. Technology has changed how they learn, work, and socialize, and long-standing norms around dating, marriage, work, play, and politics have seemingly melted away. But are Gen Z Americans really that different from other generations? Join pollster Kristen Soltis Anderson and AEI's Survey Center Director Daniel A. Cox for a conversation about kids today and tomorrow.

	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.

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9:30–10:30 a.m. Breakout Sessions — The Cloister

AI, Cybersecurity, and the Future of American Security

Mike Gallagher
Richard McCormick
Paul M. Nakasone
Kent Walker
Klon Kitchen (Moderator)

Artificial intelligence is reshaping the battlefield of cybersecurity, amplifying both threats and defenses. Former Representative Mike Gallagher, former Director of the National Security Agency Paul M. Nakasone, Representative Richard McCormick, and Google's Kent Walker examine how AI is transforming cyber operations, the implications for national security, and the urgent need for collaboration between government and industry. This discussion will explore the risks, opportunities, and policies shaping America's ability to defend itself in the AI-driven cyber era.

A Conversation with Dr. Priscilla Chan

Robert Doar (Moderator)

Priscilla Chan is the co-founder and co-CEO of the Chan Zuckerberg Initiative (CZI). Founded in 2015, CZI is harnessing the power of technology to advance its core mission to help scientists cure, prevent, or manage all diseases by the end of this century. As a tech-driven philanthropy, CZI has supported researchers in learning about human cell behavior, building open-source software tools, and creating scientific institutions to help address some of the biggest challenges in cell biology and imaging. Join Dr. Chan and AEI President Robert Doar for a conversation about the role of philanthropy in developing cutting-edge scientific research and CZI's work to build a better future for all.

The Future of Ukraine

Frederick W. Kagan
Rob Portman
Marc A. Thiessen
Danielle Pletka (Moderator)

As US-Ukraine relations enter a period of uncertainty, numerous questions are pressing. Is the United States indispensable to Ukrainian victory? Can Europe fill any gap left if the United States ceases to support Ukraine militarily and financially? Is this a harbinger of the end of the transatlantic alliance? Or are relations recoverable? There's also the question of a new basis for relations between Washington and Kyiv: Can a minerals deal resuscitate Trump-Zelensky ties? And finally, what does this mean for Russia and the new axis of evil?

10:45 a.m.–12:15 p.m. Morning Conversations — The Cloister Ballroom

Challenges and Opportunities for the Trump Presidency

10:45–11:30 a.m.

H. Lawrence Culp Jr.
Judy Marks
Chris Stirewalt (Moderator)

A Conversation with America's CEOs

As a new administration takes office, American businesses are facing broad uncertainty. Tax reform, deregulation, and technological innovation could potentially unlock growth, but geopolitical competition, trade barriers, and a heated political climate pose novel challenges to business leaders. How should businesses respond and adapt, and what does successful corporate leadership look like in 2025? Join AEI's Chris Stirewalt and two of America's leading CEOs for a conversation about the present and future of America's business environment.

11:30 a.m.–12:15 p.m.

Jack Landman Goldsmith
Don McGahn
Jeffrey A. Rosen
Adam J. White
Yuval Levin (Moderator)

Executive Power in a New Era

In returning to the presidency, President Trump has pledged to use the power of the presidential office more aggressively and effectively. How should we expect the new administration to use its authorities, approach the other branches, and shape the separation of powers? And what kinds of challenges might President Trump's approach to his office confront in the coming years? Join leading scholars of the executive branch and former Trump administration officials to think about the legislative branch in President Trump's second term.

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12:30–2:00 p.m. Luncheon — The Beach Club

Governing Over a Divided America

Mark Penn
Karl Rove
Matthew Continetti (Moderator)

American society remains deeply divided. More Americans than ever are distrustful of their neighbors, skeptical of institutions, and pessimistic about the future. The 2024 elections reflected many of these concerns, further highlighting pressing socioeconomic issues, changing demographic trends, and the necessity of challenging policy conversations. With elections in the rearview mirror, how can today's leaders across government address these challenges? What can policymakers do to alleviate Americans' rising concerns on everything from the economy to culture, as well as rebuild lacking trust in institutions? How can leaders govern over a divided America? And with a wafer-thin Republican House majority, where might compromise be necessary—and where might it prove the most complicated?

2:15–3:30 p.m. Afternoon Sessions — The Cloister

Antisemitism at the United Nations: A Global Stain

Hillel Neuer
Brett D. Schaefer
Elise M. 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 Communist 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
Gene Sperling
Kevin Stitt
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
Michael 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

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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.

5:00–6:15 p.m. Evening Conversation — The Cloister Ballroom

A Conversation with Governor Glenn Youngkin

Kristen Soltis Anderson (Moderator)

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.

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 — The Cloister

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.

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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
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.

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

Chen Jian
Audrye 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

The Cloister Ballroom

How to Best Educate Children

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

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.

12:30–2:00 p.m. Luncheon

The Beach Club

A Conversation with Alex Karp

Joe Lonsdale (Moderator)

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.

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2:15–3:30 p.m. Afternoon Sessions — The Cloister

Fixing the Crumbling Foundations of America's Military

Mackenzie Eaglen
Jimmy Panetta
Austin Scott
Raj M. Shah
Heather Wilson
Kori Schake (Moderator)

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
Scott Gottlieb
Michael R. Strain
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.

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0000000002781 RECEIVED BY: SECRETARY OF THE SENATE Date: April 14, 2026

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 **America at 250** Allen Carl Guelzo Yuval Levin Adam J. White (Moderator)	The Cloister The year 2026 will mark the 250th anniversary of the American founding. Join Adam J. White, Allen Guelzo, and Yuval Levin for a discussion of how the nation should mark the occasion and what AEI is doing to help make it a turning point for civics education.
	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 Charles Murray (Introduction)	Jonah Goldberg reflects on the perils of bad analogies on all sides of our politics.

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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	The Cloister

A Conversation with Allen Carl Guelzo

Ben Sasse (Moderator)

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?

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SPEAKERS

ELLIOTT ABRAMS	Council on Foreign Relations
KRISTEN SOLTIS ANDERSON	Echelon Insights
RICK ATKINSON	Author
CHRIS BEST	Substack
GREG BROCKMAN	OpenAI
DOUG BURGUM	US Secretary of the Interior
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
CHEN JIAN	New York University and New York University Shanghai
JAMES P. CLEMENTS	Clemson University
L. JAY CROSS	Howard Hughes Holdings
H. LAWRENCE CULP JR.	GE Aerospace
RONALD DANIELS	Johns Hopkins University
BRIAN DEESE	Massachusetts Institute of Technology
DANIEL DIERMEIER	Vanderbilt University
PAUL FINEBAUM	ESPN
MIKE FLOOD	US House of Representatives (R-NE)
JASON FURMAN	Harvard University
MIKE GALLAGHER	Former Congressman (R-WI)
PAUL A. GIGOT	*The Wall Street Journal*
ALLEN CARL GUELZO	Princeton University
JONATHAN HAIDT	New York University Stern School of Business
JAN HATZIUS	Goldman Sachs
EYAL HULATA	Foundation for the Defense of Democracies
KIMBERLY KAGAN	Institute for the Study of War
VLADIMIR KARA-MURZA	Free Russia Foundation
ALEX KARP	Palantir
BRIAN P. KEMP	Governor of Georgia
MIKE LEE	US Senate (R-UT)
JOE LONSDALE	8VC
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JOHN MOOLENAAR	US House of Representatives (R-MI)
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PAUL M. NAKASONE	Director, Vanderbilt University Institute of National Security
HILLEL NEUER	United Nations Watch
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BEN SASSE	Former US Senator (R-NE)
AUSTIN SCOTT	US House of Representatives (R-GA)

JASON SMITH	US House of Representatives (R-MO)
GENE SPERLING	Former Director, National Economic Council
ELISE M. STEFANIK	US House of Representatives (R-NY)
ANGELA STENT	Georgetown University
KEVIN STITT	Governor of Oklahoma
AG SULZBERGER	*The New York Times*
MARC SUMERLIN	Evenflow Macro
THOMAS SUOZZI	US House of Representatives (D-NY)
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YAQIU (RACHEL) WANG	Freedom House
HEATHER WILSON	University of Texas at El Paso
DANIEL YERGIN	S&P Global
GLENN YOUNGKIN	Governor of Virginia
MARK ZANDI	Moody's Analytics
CONNOR ZWICK	Speak

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