MEMBER/OFFICER POST-TRAVEL DISCLOSURE FORM

This form is for disclosing the receipt of travel expenses from a private source for travel taken in connection with a Member or officer’s official duties. This form does not eliminate the need to report privately-funded travel on the Member or officer’s annual Financial Disclosure Statement. In accordance with House Rule 25, clause 5, you must complete this form and file it with the Clerk of the House by email at gifttravelreports@mail.house.gov, within 15 days after travel is completed. Please do not file this form with the Committee on Ethics.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

1. Name of Traveler: Patrick McHenry

2. a. Name of Accompanying Relative: Giulia McHenry
   b. Relationship to Traveler: ☑ Spouse     ☐ Child     ☐ Other (specify):

   b. Dates at Personal Expense, if any: 3/7/2024 & 3/11/2024

4. Departure City: Washington, DC
   Destination: Sea Island, GA
   Return City: Washington, DC

5. Sponsor(s), Who Paid for the Trip: American Enterprise Institute

6. Describe Meetings and Events Attended (attach additional pages if necessary):

7. Attached to this form are each of the following, signify that each item is attached by checking the corresponding box:
   a. ☑ a completed Sponsor Post-Travel Disclosure Form;
   b. ☑ the Primary Trip Sponsor Form completed by the trip sponsor prior to the trip, including all attachments and the Additional Sponsor Form(s);
   c. ☑ page 2 of the completed Traveler Form submitted by the Member or officer; and
   d. ☑ the letter from the Committee on Ethics approving my participation on this trip.

8. a. ☑ I represent that I participated in each of the activities reflected in the attached sponsor's agenda. Signify statement is true by checking the box.
   b. If not, explain:

I certify that the information contained in this form is true, complete, and correct to the best of my knowledge. I have determined that all of the expenses on the attached Sponsor Post-Travel Disclosure Form were necessary and that the travel was in connection with my duties as a Member or officer of the U.S. House of Representatives and would not create the appearance that I am using public office for private gain.

Member / Officer Signature: [Signature]

Date: 3/25/2024

last updated 7/2023
SPONSOR POST-TRAVEL DISCLOSURE FORM

This form must be completed by an officer of any organization that served as the primary trip sponsor in providing travel expenses or reimbursement for travel expenses to House Members, officers, or employees under House Rule 25, clause 5. A completed copy of the form must be provided to each House Member, officer, or employee who participated in the trip within 10 days of their return. You must answer all questions, and check all boxes, on this form for your submission to comply with House Rules and the Committee’s Travel Regulations. Failure to comply with this requirement may result in the denial of future requests to sponsor trips and/or subject the current traveler to disciplinary action or a requirement to repay the trip expenses.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

1. Sponsor(s) who paid or provided in-kind support for the trip: American Enterprise Institute

2. Travel Destination(s): Sea Island, Georgia

3. Date of Departure: 3/8/2024 Date of Return: 3/11/2024

4. Name(s) of Traveler(s): Rep. Patrick McHenry, Giulia McHenry
   Note: You may list more than one traveler on a form only if all information is identical for each person listed.

5. Actual amount of expenses paid on behalf of, or reimbursed to, each individual named in Question 4:

<table>
<thead>
<tr>
<th>Traveler</th>
<th>Total Transportation Expenses</th>
<th>Total Lodging Expenses</th>
<th>Total Meal Expenses</th>
<th>Total Other Expenses (dollar amount per item and description)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traveler</td>
<td>$1,149.04</td>
<td>$1,362.76</td>
<td>$1,007</td>
<td>$368.18 (associated service charges, taxes, and fees for meals)</td>
</tr>
</tbody>
</table>

   Accompanying Family Member | $198.60 (airfare) | N/A | $1,007 | $368.18 (associated service charges, taxes, and fees for meals) |

6. [ ] All expenses connected to the trip were for actual costs incurred and not a per diem or lump sum payment.
   Signify statement is true by checking box.

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

Signature: ___________________________ Date: 3/18/2024

Name: S. Christopher Gavin Title: Associate Director, Government Relations

Organization: American Enterprise Institute

[ ] I am an officer of the above-named organization. Signify statement is true by checking box.

Address: 1789 Massachusetts Avenue NW, Washington, DC 20036

Telephone: 202-419-5250 E-mail: chris.gavin@aei.org

Committee staff may contact the above-named individual if additional information is required.

If you have questions regarding your completion of this form, please contact the Committee on Ethics at 202-225-7103.

last updated 7/2023
TRAVELER FORM

This form should be completed by House Members, officers, or employees seeking Committee approval of privately-sponsored travel or reimbursement for travel under House Rule 25, clause 5. The completed form should be submitted directly to the Committee by each invited House Member, officer, or employee, together with the completed and signed trip sponsor form(s) and any attachments. A copy of this form, minus this initial page, will be made available for public inspection.

This form and any attachments may be submitted at 1015 Longworth House Office Building or travel.requests@mail.house.gov.

Your completed request must be submitted to the Committee no less than 30 days before your proposed departure date. Absent exceptional circumstances, permission will not be granted for requests received less than 30 days before the trip commences. You must receive explicit approval from the Committee before you depart on this trip.

Name of Traveler: Patrick McHenry

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001.

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

Signature: [Signature]

Name of Signatory (if other than traveler): [Signatory Name]

For Staff (name of employing Member or Committee):

Office Address: 2134 Rayburn House Office Building

Telephone Number: 202-225-2570

Email Address of Contact Person: sarria.garcia@mail.house.gov

☐ Check this box if the sponsoring entity is a media outlet, the purpose of the trip is to make a media appearance sponsored by that entity, and these forms are being submitted to the Committee less than 30 days before the trip departure date.

NOTE: You must complete all of the contact information fields above, as Committee staff may need to contact you if additional information is required.

KEEP A COPY OF THIS FORM. Page 2 (but not this page) must be submitted to the Clerk as part of the post-travel disclosure required by House Rule 25. Travel Regulation § 404(d) also requires you to keep a copy of all request forms and supporting paperwork for three subsequent Congresses from the date of travel.

If there are any questions regarding this form, please contact the Committee on Ethics at 202-225-7103 or via email: travel.requests@mail.house.gov.

last updated 7/2023
TRAVELER FORM

1. Name of Traveler:  

2. Sponsor(s) who will be paying or providing in-kind support for the trip:  

3. City and State OR Foreign Country of Travel:  

4. a. Date of Departure:  

b. Date of Return:  

b. Yes ☑ No  Will you be extending the trip at your personal expense?  

If yes, list dates at personal expense:  

5. a. Yes ☑ No  Will you be accompanied by a family member at the sponsor’s expense? If yes:  

(1) Name of Accompanying Family Member:  

(2) Relationship to Traveler:  ☑ Spouse  ☐ Child  ☐ Other(specify):  

(3) Yes ☑ No  Accompanying Family Member is at least 18 years of age?  

6. a. Yes ☐ No ☑ Did the trip sponsor answer “Yes” to Question 8(c) on the Primary Trip Sponsor Form (i.e., travel is sponsored by an entity that employs a registered federal lobbyist or a foreign agent)?  

b. If yes, and you are requesting lodging for two nights, explain why the second night is warranted:  

7. Yes ☑ No  Primary Trip Sponsor Form is attached, including agenda, invitation, invitee list, and any other attachments and Additional Sponsor Forms.  

NOTE: The agenda should show the traveler’s individual schedule, including departure and arrival times and identify the specific events in which the traveler will be participating.  

8. Explain why participation in the trip is connected to the traveler’s official or representational duties. Staff should include their job title and how the activities on the itinerary relate to their duties.  

9. Yes ☐ No ☑ Is the traveler aware of any registered federal lobbyists or foreign agents involved in planning, organizing, requesting, or arranging the trip?  

10. For staff travelers, to be completed by your employing Member:  

ADVANCED AUTHORIZATION OF EMPLOYEE TRAVEL  

I hereby authorize the individual named above, an employee of the U.S. House of Representatives who works under my direct supervision, to accept expenses for the trip described in this request. I have determined that the above-described travel is in connection with my employee’s official duties and that acceptance of these expenses will not create the appearance that the employee is using public office for private gain.  

Signature of Employing Member:  Date:  

1
PRIMARY TRIP SPONSOR FORM

This form should be completed by private entities offering to provide travel or reimbursement for travel to House Members, officers, or employees under House Rule 25, clause 5. A completed copy of the form (and any attachments) should be provided to each invited House Member, officer, or employee, who will then forward it to the Committee together with a Traveler Form at least 30 days before the start date of the trip. The trip sponsor should NOT submit the form directly to the Committee. The Committee’s website (ethics.house.gov) provides detailed instructions for filling out the form. The Committee will notify the House invitees directly of its decision and will not notify the trip sponsors.

NOTE: Willful or knowing misrepresentations on this form may be subject to criminal prosecution pursuant to 18 U.S.C. § 1001. Failure to comply with the Committee’s Travel Regulations may also lead to the denial of permission to sponsor future trips. Signatures must comply with section 104(bb) of the Travel Regulations.

1. Sponsor who will be paying for the trip:

   American Enterprise Institute

2. □ I represent that the trip will not be financed, in whole or in part, by a registered federal lobbyist or foreign agent. **Signify that the statement is true by checking box.**

3. **Check only one.** I represent that:
   a. □ The primary trip sponsor has not accepted from any other source, funds intended directly or indirectly to finance any aspect of the trip; OR
   b. □ The trip is arranged without regard to congressional participation and the primary trip sponsor has accepted funds only from entities that will receive a tangible benefit in exchange for those funds; OR
   c. □ The primary trip sponsor has accepted funds, services, or in-kind assistance from other source(s) intended directly or indirectly to finance all or part of this trip and has enclosed disclosure forms from each of those entities.

   If “c” is checked, list the names of the additional sponsors: ____________________________

4. Provide names and titles of ALL House Members and employees you are inviting. **For each House invitee, provide an explanation of why the individual was invited** (include additional pages if necessary): See addendum

5. Yes □ No □ Is travel being offered to an accompanying family member of the House invitee(s)?

6. Date of Departure: March 7, 2024 Date of Return: March 10, 2024

7. a. City of departure: Washington, DC
   b. Destination(s): Sea Island, Georgia
   c. City of return: Member’s Discretion

8. **Check only one.** I represent that
   a. □ The sponsor of the trip is an institution of higher education within the meaning of section 101 of the Higher Education Act of 1965; OR
   b. □ The sponsor of the trip does not retain or employ a registered federal lobbyist or foreign agent; OR
   c. □ The sponsor employs or retains a registered federal lobbyist or foreign agent, but the trip is for attendance at a one-day event and lobbyist/foreign agent involvement in planning, organizing, requesting, or arranging the trip was de minimis under the Committee’s travel regulations.

last updated 7/2023
9. Check only one of the following.
   a. [ ] I checked 8(a) or (b) above; OR
   b. [ ] I checked 8(c) above but am not offering any lodging; OR
   c. [ ] I checked 8(c) above and am offering lodging and meals for one night; OR
   d. [ ] I checked 8(c) above and am offering lodging and meals for two nights. If you checked this box, explain why the second night of lodging is warranted.

10. [ ] Attached is a detailed agenda of the activities House invitees will be participating in during the travel (i.e., an hourly description of planned activities for trip invitees). Indicate agenda is attached by checking box.

11. Check only one of the following.
   a. [ ] I represent that a registered federal lobbyist or foreign agent will not accompany House Members or employees on any segment of the trip. Signify the statement is true by clicking the box; OR
   b. [ ] Not Applicable. Trip sponsor is a U.S. institution of higher education.

12. For each sponsor required to submit a sponsor form, describe the sponsor’s interest in the subject matter of the trip and its role in organizing and/or conducting the trip:

   [AEI is a non-profit, tax-exempt public policy research organization. AEI plans, sponsors, and pays for the entirety of World Forum. The World Forum addresses public policy issues important to AEI research, including the status of economic policy, reforms in higher education, US foreign policy, science and technology, and domestic policy.]

13. Answer parts a and b. Answer part c if necessary.
   a. Mode of travel: Air [ ] Rail [ ] Bus [ ] Car [ ] Other [ ] (specify: Car to/from airport ________)
   b. Class of travel: Coach [ ] Business [ ] First [ ] Charter [ ] Other [ ] (specify: ________)
   c. If travel will be first class, or by chartered or private aircraft, explain why such travel is warranted:

14. [ ] I represent that the expenditures related to local area travel during the trip will be unrelated to personal or recreational activities of the invitee(s). Signify that the statement is true by checking box.

15. Check only one. I represent that either:
   a. [ ] The trip involves an event that is arranged or organized without regard to congressional participation and that meals provided to congressional participants are similar to those provided to or purchased by other event attendees; OR
   b. [ ] The trip involves events that are arranged specifically with regard to congressional participation. If “b” is checked:
      1) Detail the cost per day of meals (approximate cost may be provided): __________________________

16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
   Hotel Name: The Cloister at Sea Island  City: Sea Island, GA  Cost Per Night: $681.38
   Reason(s) for Selecting: This is the only lodging option as it's a private island and is the only hotel.

   Hotel Name: __________________________  City: __________________________  Cost Per Night: __________________________
   Reason(s) for Selecting: __________________________

   Hotel Name: __________________________  City: __________________________  Cost Per Night: __________________________
   Reason(s) for Selecting: __________________________
17. ☐ I represent that all expenses connected to the trip will be for actual costs incurred and not a per diem or lump sum payment. *Signify that the statement is true by checking the box.*

18. **Total Expenses for each Participant:**

<table>
<thead>
<tr>
<th></th>
<th><strong>Total Transportation Expenses per Participant</strong></th>
<th><strong>Total Lodging Expenses per Participant</strong></th>
<th><strong>Total Meal Expenses per Participant</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>For each Member, Officer, or Employee</td>
<td>See attached addendum</td>
<td>See attached addendum</td>
<td>See attached addendum</td>
</tr>
<tr>
<td>For each Accompanying Family Member</td>
<td>See attached addendum</td>
<td>See attached addendum</td>
<td>See attached addendum</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th><strong>Other Expenses</strong> (dollar amount per item)</th>
<th><strong>Identify Specific Nature of “Other” Expenses (e.g., taxi, parking, registration fee, etc.)</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>For each Member, Officer, or Employee</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>For each Accompanying Family Member</td>
<td>N/A</td>
<td></td>
</tr>
</tbody>
</table>

19. **Check only one:**
   a. ☐ I certify that I am an officer of the organization listed below; **OR**
   b. ☐ *Not Applicable.* Trip sponsor is an individual or a U.S. institution of higher education.

20. **I certify by my signature that**
    a. I read and understand the Committee’s Travel Regulations;
    b. I am not a registered federal lobbyist or registered foreign agent; and
    c. The information on this form is true, complete, and correct to the best of my knowledge.

   **Signature:** [Signature]  
   **Date:** 1/31/2024  
   **Name:** S. Christopher Gavin  
   **Title:** Associate Director, Government Relations  
   **Organization:** American Enterprise Institute  
   **Address:** 1789 Massachusetts Ave NW, Washington, DC 20036  
   **Email:** chris.gavin@aei.org  
   **Telephone:** +1 480 868 1823

If there are questions regarding this form, please contact the Committee on Ethics at 202-225-7103 or travel.requests@mail.house.gov.
March 6, 2024

The Honorable Patrick T. McHenry  
U.S. House of Representatives  
2134 Rayburn House Office Building  
Washington, DC 20515

Dear Colleague:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your and your spouse's proposed trip to Sea Island, Georgia, scheduled for March 7 to 11, 2024, sponsored by American Enterprise Institute. We note that this trip includes one day at your personal expense.

You must complete a Member/Officer Post-Travel Disclosure Form and file it, together with a Sponsor Post-Travel Disclosure Form completed by the trip sponsor, with the Clerk of the House within 15 days after your return from travel. As part of that filing, you are also required to attach a copy of this letter and both the Traveler and Primary Trip Sponsor Forms (including attachments) you previously submitted to the Committee in seeking pre-approval for this trip. You must also report all travel expenses totaling more than $480 from a single source on the “Travel” schedule of your annual Financial Disclosure Statement covering this calendar year. Finally, Travel Regulation § 404(d) also requires you to keep a copy of all request forms and supporting information provided to the Committee for three subsequent Congresses from the date of travel.

If you have any further questions, please contact the Committee’s Office of Advice and Education at extension 5-7103.

Sincerely,

Michael Guest  
Chairman

Susan Wild  
Ranking Member

MG/SW:mc
2024 AEI World Forum

Addendum

Question 4:

Ami Bera: This member was invited because of his positions on the House Foreign Affairs Committee and Permanent Select Committee on Intelligence.

Byron Donalds: This member was invited because of his positions on the House Committee on Financial Services and House Committee on Oversight.

Mike Gallagher: This member was invited because of his position as the Chairman of the Select Committee on the Strategic Competition between the United States and the Chinese Communist Party, and as the Chairman of the House Armed Services Subcommittee on Cyber, Information Technologies, and Innovation.

Garret Graves: This member was invited because of his positions on the House Committee on Natural Resources and the House Committee on Transportation and Infrastructure.

Patrick McHenry: This member was invited because of his position as Chairman of the House Financial Services Committee.

Jimmy Panetta: This member was invited because of his positions on the House Committee on Armed Services and the Ways and Means Committee.

Steve Scalise: This member was invited because of his role as House Majority Leader.

Jason Smith: This member was invited because of his role as Chairman of the House Ways and Means Committee and Joint Committee on Taxation.

Elise Stefanik: This member was invited because of her position as Republican Conference Chair and positions on the House Armed Services Committee and House Education and Workforce Committee.

Mike Waltz: This member was invited because of his positions on the House Committee on Foreign Affairs, House Committee on Armed Services, and House Permanent Select Committee on Intelligence.

Brad Wenstrup: This member was invited because of his positions on the House Committee on Ways and Means and the Permanent Select Committee on Intelligence.
Question 18 Addendum:

For each Members, Officer, or Employee

- Total Transportation per Participant: $1,174.58 ($airfare 600*, $574.58 round trip for ground transportation from JAX to Sea Island.
  - Ground transportation is only charged once per couple
  - *Avg. roundtrip for coach-class airfare, DCA-JAX. Final costs subject to airfare availability, travel dates, and specific return destination.
- Total Lodging per Participant: MAX: $2,044.14 ($681.38/night)
  - Lodging rates subject to decrease based on final room availability, room-type assignment, and length of stay.
  - The $681.38 nightly rate is the maximum rate (including taxes and fees) for the standard room type at Sea Island.
- Total Meal Expenses per Participant: MAX: $2,127.64 per person. Total also includes $569.64 in service charges, taxes, and fees.
  (3 Breakfast, $261 total)(3 Lunch, $234 total) (3 Receptions, $258 total)(3 Dinner, $806)

For each Accompanying Family Member

- Total Transportation per Participant: $1,174.58 ($airfare 600*, $574.58 round trip for ground transportation from JAX to Sea Island.
  - Ground transportation is only charged once per couple
  - *Avg. roundtrip for coach-class airfare, DCA-JAX. Final costs subject to airfare availability, travel dates, and specific return destination.
- Total Lodging per Participant: MAX: $2,044.14 ($681.38/night)
  - Lodging rates subject to decrease based on final room availability, room-type assignment, and length of stay.
  - The $681.38 nightly rate is the maximum rate (including taxes and fees) for the standard room type at Sea Island.
- Total Meal Expenses per Participant: MAX: $2,127.64 per person. Total also includes $569.64 in service charges, taxes, and fees.
  (3 Breakfast, $261 total)(3 Lunch, $234 total) (3 Receptions, $258 total)(3 Dinner, $806)
## 2024 Agenda at a Glance

### Thursday, March 7

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Day</td>
<td>Registration</td>
</tr>
<tr>
<td>5:00–6:00 p.m.</td>
<td>Reception</td>
</tr>
<tr>
<td>6:00–7:00 p.m.</td>
<td>Opening and Welcome</td>
</tr>
<tr>
<td>7:00–8:00 p.m.</td>
<td>Dinner</td>
</tr>
<tr>
<td>8:00–10:00 p.m.</td>
<td>Post-Dinner Reception</td>
</tr>
<tr>
<td>8:30 p.m.</td>
<td>Starlight Chats</td>
</tr>
</tbody>
</table>

### Friday, March 8

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:30–9:30 a.m.</td>
<td>Breakfast Opens</td>
</tr>
<tr>
<td>8:00–9:00 a.m.</td>
<td>Early Bird Sessions</td>
</tr>
<tr>
<td>9:30–10:30 a.m.</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td>10:45 a.m.–12:15 p.m.</td>
<td>Morning Keynote</td>
</tr>
<tr>
<td>12:30–1:45 p.m.</td>
<td>Luncheon</td>
</tr>
<tr>
<td>2:00–3:15 p.m.</td>
<td>Afternoon Sessions</td>
</tr>
<tr>
<td>3:15–5:00 p.m.</td>
<td>Afternoon Break</td>
</tr>
<tr>
<td>5:00–6:00 p.m.</td>
<td>Evening Conversation</td>
</tr>
<tr>
<td>6:00–7:00 p.m.</td>
<td>Reception</td>
</tr>
<tr>
<td>7:15–8:30 p.m.</td>
<td>Dinner</td>
</tr>
<tr>
<td>8:45–9:45 p.m.</td>
<td>Starlight Chats</td>
</tr>
</tbody>
</table>

### Saturday, March 9

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:30–9:30 a.m.</td>
<td>Breakfast Opens</td>
</tr>
<tr>
<td>8:00–9:00 a.m.</td>
<td>Early Bird Sessions</td>
</tr>
<tr>
<td>9:30–10:30 a.m.</td>
<td>Breakout Sessions</td>
</tr>
<tr>
<td>10:45 a.m.–12:15 p.m.</td>
<td>General Session</td>
</tr>
<tr>
<td>12:30–1:45 p.m.</td>
<td>Luncheon</td>
</tr>
<tr>
<td>2:00–3:15 p.m.</td>
<td>Afternoon Sessions</td>
</tr>
<tr>
<td>3:15–5:00 p.m.</td>
<td>Afternoon Break</td>
</tr>
<tr>
<td>5:00–6:00 p.m.</td>
<td>Evening Conversation</td>
</tr>
<tr>
<td>6:00–7:00 p.m.</td>
<td>Reception</td>
</tr>
<tr>
<td>7:15–8:30 p.m.</td>
<td>Dinner</td>
</tr>
<tr>
<td>8:45–9:45 p.m.</td>
<td>Starlight Chats</td>
</tr>
<tr>
<td>8:45–10:30 p.m.</td>
<td>Reception</td>
</tr>
</tbody>
</table>

### Sunday, March 10 (Daylight Saving Time)

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:30–10:15 a.m.</td>
<td>Breakfast Opens</td>
</tr>
<tr>
<td>9:00–10:15 a.m.</td>
<td>Early Bird Session</td>
</tr>
</tbody>
</table>

As of January 26, 2024 | Subject to change. The formal agenda is forthcoming and AEI will provide updates as it evolves.