

# COMMITTEE ON ETHICS

## MEMBER/OFFICER POST-TRAVEL DISCLOSURE FORM Original Amendment

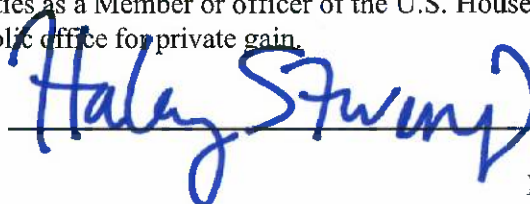
This form is for disclosing the receipt of travel expenses from a private source for travel taken in connection with a Member or officer's official duties. This form does not eliminate the need to report privately-funded travel on the Member or officer's annual *Financial Disclosure Statement*. In accordance 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](mailto: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: Haley Stevens
2. a. Name of Accompanying Relative: Maria Marcotte **OR**  None  
b. Relationship to Traveler:  Spouse  Child  Other (specify): Parent
3. a. Dates: Departure: 06/16/2024 Return: 06/21/2024  
b. Dates at Personal Expense, if any: \_\_\_\_\_ **OR**  None
4. Departure City: Birmingham, MI Destination: Lisbon, Portugal Return City: Birmingham, MI
5. Sponsor(s), Who Paid for the Trip: Center Forward
6. Describe Meetings and Events Attended (attach additional pages if necessary): Attended panels and discussions regarding opportunities for collaboration with the US to foster economic development, was briefed on security issues by NATO officials, and met with diplomatic staff/officials. Agenda is attached.
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: \_\_\_\_\_



Date: 07/01/2024

# COMMITTEE ON ETHICS

## SPONSOR POST-TRAVEL DISCLOSURE FORM

Original  Amendment

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: Center Forward

2. Travel Destination(s): Lisbon, Portugal

3. Date of Departure: June 16, 2024 Date of Return: June 21, 2024

4. Name(s) of Traveler(s): Representative Haley Stevens & Maria Marcotte


*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:

|                            | Total Transportation Expenses                   | Total Lodging Expenses | Total Meal Expenses | Total Other Expenses (dollar amount per item and description) |
|----------------------------|---|------------------------|---------------------|---|
| Traveler                   | \$13,156.93<br>(includes ground transportation) | \$855.00               | \$315.00            | \$15.00 (personalized tile)                                   |
| Accompanying Family Member | \$13,156.93<br>(includes ground transportation) | \$0.00                 | \$281.00            | \$0.00  |

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: Sunday, June 23, 2024

Name: Riley Kilburg Title: Executive Director

Organization: Center Forward

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

Address: 1214A Ingleside Ave, McLean, VA 22101

Telephone: (563) 542-6821 Email: riley@center-forward.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.

# COMMITTEE ON ETHICS

## 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](mailto: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: Haley Stevens

**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: \_\_\_\_\_

*Haley Stevens*

Name of Signatory (if other than traveler): \_\_\_\_\_

For Staff (name of employing Member or Committee): \_\_\_\_\_

Office Address: 2411 Rayburn House Office, 45 Independence Ave SW, Washington, DC 20515

Telephone Number: 202-225-8171

Email Address of Contact Person: wyatt.ludman@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](mailto:travel.requests@mail.house.gov).

# COMMITTEE ON ETHICS

## TRAVELER FORM

1. Name of Traveler: Haley Stevens
2. Sponsor(s) who will be paying or providing in-kind support for the trip: Center Forward
3. City and State **OR** Foreign Country of Travel: Portugal
4. a. Date of Departure: Monday, June 17, 2024 Date of Return: Friday, June 21, 2024  
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: Maria Marcotte  
(2) Relationship to Traveler:  Spouse  Child  Other (specify): Mother  
(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 individual official or representational duties. **Staff should include their job title and how the activities on the itinerary relate to their duties.**  
Congresswoman Stevens was invited to represent the United States of America as part of a bipartisan Congressional Delegation during the Center Forward International Issues Conference. The Members will discuss and share pragmatic policy priorities that impact the Member's work and the international community.
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: \_\_\_\_\_

*Haley Stevens*

Date: \_\_\_\_\_

05/13/2024



# COMMITTEE ON ETHICS

## 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:

Center Forward

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): **Please see attachment**

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

6. Date of Departure: Monday, June 17, 2024 Date of Return: Friday, June 21, 2024

7. a. City of departure: Washington, D.C. or District

b. Destination(s): Lisbon, Portugal

c. City of return: Washington, D.C. or District

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.

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:

Please see attachment.

13. **Answer parts a and b. Answer part c if necessary:**

- a. Mode of travel: Air  Rail  Bus  Car  Other  (specify: \_\_\_\_\_)
- 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): \$100

2) Provide the reason for selecting the location of the event or trip: Please see attachment.

16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:

Hotel Name: The Ivens Hotel City: Lisbon, Portugal Cost Per Night: \$300 (VAT incl)

Reason(s) for Selecting: Central location to our government meetings, business visits, and availability

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:**

| <input type="checkbox"/> Actual Amounts<br><input checked="" type="checkbox"/> Good Faith Estimates | Total Transportation Expenses per Participant                  | Total Lodging Expenses per Participant                                       | Total Meal Expenses per Participant  |
|---|--|--|--|
| For each Member, Officer, or Employee   | Approximately \$14,000 USD <input checked="" type="checkbox"/> | Approximately \$1,200 USD (VAT included) <input checked="" type="checkbox"/> | Approximately \$300 USD (VAT included) <input checked="" type="checkbox"/> |
| For each Accompanying Family Member   | Approximately \$14,000 USD <input checked="" type="checkbox"/> | Approximately \$0.00 USD <input checked="" type="checkbox"/>                 | Approximately \$300 USD (VAT included) <input checked="" type="checkbox"/> |


|                                       | Other Expenses (dollar amount per item) | Identify Specific Nature of "Other" Expenses (e.g., taxi, parking, registration fee, etc.) |
|---------------------------------------|---|--|
| For each Member, Officer, or Employee | \$0.00                                  | N/A  |
| For each Accompanying Family Member   | \$0.00                                  | N/A  |

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:  Date: Wednesday, April 24, 2024  
 Name: Riley Kilburg Title: Executive Director  
 Organization: Center Forward  
 Address: 1214A Ingleside Avenue, McLean, VA 22101  
 Email: riley@center-forward.org Telephone: (563) 542-6821

If there are questions regarding this form, please contact the Committee on Ethics at 202-225-7103 or [travel.requests@mail.house.gov](mailto:travel.requests@mail.house.gov).

Michael Guest, Mississippi  
*Chairman*  
Susan Wild, Pennsylvania  
*Ranking Member*

David P. Joyce, Ohio  
John H. Rutherford, Florida  
Andrew R. Garbarino, New York  
Michelle Fischbach, Minnesota

Veronica Escobar, Texas  
Mark DeSaulnier, California  
Deborah K. Ross, North Carolina  
Glenn F. Ivey, Maryland



ONE HUNDRED EIGHTEENTH CONGRESS

**U.S. House of Representatives**

COMMITTEE ON ETHICS

Thomas A. Rust  
*Staff Director and Chief Counsel*

Keelie Broom  
*Counsel to the Chairman*

David Arrojo  
*Counsel to the Ranking Member*

1015 Longworth House Office Building  
Washington, D.C. 20515-6328  
Telephone: (202) 225-7103  
Facsimile: (202) 225-7392

June 5, 2024

The Honorable Haley M. Stevens  
U.S. House of Representatives  
2411 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 parent's proposed trip to Portugal,<sup>1</sup> scheduled for June 17 to 21, 2024, sponsored by Center Forward.

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.

Because the trip may involve meetings with foreign government representatives, we note that House Members may accept, under the Foreign Gifts and Decorations Act (FGDA), gifts "of minimal value [currently \$480] tendered as a souvenir or mark of courtesy" by a foreign government. Any tangible gifts valued in excess of minimal value received from a foreign government must, within 60 days of acceptance, be disclosed on a Form for Disclosing Gifts from Foreign Governments and either turned over to the Clerk of the House, or, with the written approval of the Committee, retained for official use.

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<sup>1</sup> Please be aware that the Committee's review of the proposed trip does not extend to either the security situation in the destination country or security related to foreign travel in general. We recommend you contact the Office of House Security (OHS) for a safety and security briefing prior to your departure. OHS may be reached at (202) 226-2044 or ohsstaff@mail.house.gov. House travelers should also register for the U.S. State Department's Smart Traveler Enrollment Program at <https://step.state.gov>.



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



Center Forward International Issues Conference  
Lisbon, Portugal — June 17 - June 21, 2024  
Conference Agenda

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Center Forward Contact Information

Ryan McAlpin | (585) 857-1921 | [ryan@center-forward.org](mailto:ryan@center-forward.org)  
Riley Kilburg | (563) 542-6821 | [riley@center-forward.org](mailto:riley@center-forward.org)  
Cori Kramer | (202) 550-0888 | [cori@center-forward.org](mailto:cori@center-forward.org)  
Ava Bowman Thomas | (402) 889-7058 | [ava@center-forward.org](mailto:ava@center-forward.org)  
Justin Davey | (703) 216-5608 | [justin@daveyconsultingdc.com](mailto:justin@daveyconsultingdc.com)

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|                              |
|------------------------------|
| <b>Monday, June 17, 2024</b> |
|------------------------------|

**10:20 pm**

Members and staff depart Washington Dulles International Airport (IAD)

TAP Flight 0234 | 7 h 15 min flight time

**Tuesday, June 18, 2024**

**BREAKFAST ON YOUR OWN**

Breakfast is available in the Rocco Restaurant, located on the lobby floor, from  
6:30 am - 10:00 am

**\*\*Business attire**

**10:35 am** Arrive at Humberto Delgado International Airport (LIS) in Lisbon, Portugal.

Humberto Delgado International Airport (LIS) | Alameda das Comunidades Portuguesas, 1700-111 Lisboa, Portugal.

*After collecting your luggage and clearing customs, you will walk into the Terminal Arrival Hall. The chauffeur will be waiting to greet you with a card noting "Center Forward" at the barrier which you will see immediately as you walk into the Arrivals Hall. After everyone has gathered, the chauffeur will depart the airport.*

**11:00 am - 11:30 am** Depart Humberto Delgado International Airport en route to The Ivens Hotel via shuttle (30 min).

**11:30 am - 12:30 pm** Check-in and Registration at The Ivens Hotel

The Ivens Hotel | R. Capelo 5, 1200-224 Lisboa, Portugal

*Conference participants will check into their hotel rooms and briefly refresh for the day's programming. Center Forward staff will be located in the lobby to assist with the check-in process.*

**12:30 pm - 1:00 pm** Welcome Remarks & Conference Overview

- Riley Kilburg, Executive Director, Center Forward
- Cori Kramer, CEO, Center Forward

*Cori Kramer will lead an overview of the agenda for conference participants and provide an introduction to the pressing issues we will be discussing over the next three days. Topics will include international trade, healthcare, workforce, manufacturing, energy, and current relations with Portugal. Delegation attendees will also receive a briefing from the security team.*

*Lunch will be provided.*

**1:00 pm - 1:30 pm** Security Debrief

- Faris Amra, Founder, RedCloud USA

*RedCloud USA Security Services will provide a debrief on the security situation in Portugal and how they will operate throughout the conference to ensure the safety of all participants.*

**1:30 pm - 2:00 pm**

Depart The Ivens Hotel en route to the STRIKFORNATO Military Base. While in transit, a member of the Center Forward team will brief conference participants on the history of U.S. involvement on the base, and what the STRIKFORNATO program aims to achieve through its multinational operation.

STRIKFORNATO | Reduto Gomes Freire, Estr. Medrosa, 2780-070, Portugal

**2:00 pm - 3:15 pm**

STRIKFORNATO Debrief and Facility Tour

- Captain Andrew G. Liggett, U.S. Representative, NATO Force Structure Command

*Captain Andrew Liggett, U.S. Representative on the NATO Force Command, will provide a command brief for conference participants on the mission of the base, and the multinational cooperation that is critical to the mission's success. Afterward, conference participants will get a tour of the facility to see first-hand the military exercises that are conducted on this base.*

**3:15 pm - 3:45 pm**

Depart the STRIKFORNATO military base en route to The Ivens Hotel.



- 3:45 pm - 4:15 pm** Break.
- 4:15 pm - 4:30 pm** Depart The Ivens en route to the residence of the U.S. Ambassador to Portugal (15 min). While in transit, a member of the Center Forward team will brief conference participants on Ambassador Levine, and what her priorities are as the representative of the U.S. government to Portugal.
- Casa Carlucci - Residence of the U.S. Ambassador to Portugal | R. Sacramento à Lapa 18, Lisboa, Portugal
- 4:30 pm - 6:00 pm** Briefing from the United States Embassy on the Political and Cultural aspects of the U.S.-Portugal relationship
- The Hon. Randi Charno Levine, U.S. Ambassador to Portugal, U.S. Embassy in Portugal
- Representatives from the United States Embassy in Portugal will brief Issues Conference participants on the history of the U.S.-Portugal relationship, the values that bind the two nations, and the business partnership the two countries have relied upon for decades.*
- 6:00 pm - 6:30 pm** Depart the residence of the U.S. Ambassador to Portugal en route to Trindade (30 min). While in transit, a member of the Center Forward team will brief conference participants on Portugal's commitment to European integration and transatlantic relationships.
- 6:30 pm - 8:30 pm** Dinner — U.S-Portugal Relations
- Trindade | R. Nova da Trindade 20C, 1200-303 Lisboa, Portugal
- Spouses are welcome at dinner.
- The Hon. Mr. Paulo Rangel, Minister of Foreign Affairs, Government of Portugal
- The Hon. Paulo Rangel, Minister of Foreign Affairs for the Portuguese government, will highlight the important nature of fostering a strong collaboration between the two nations. Emphasizing the ties between the United States and Europe, he will underscore the importance of cooperative efforts to address common challenges and enhance mutual success, showcasing a commitment from the Portuguese government to building a resilient and beneficial partnership.*
- Closing Remarks by Cori Kramer, Executive Director, Center Forward

**Wednesday, June 19, 2024**

**BREAKFAST ON YOUR OWN**

Breakfast is available in the Rocco Restaurant, located on the lobby floor, from  
6:30 am - 10:00 am

**\*\*Business casual attire for day.**

- 8:50 am - 9:00 am**      Conference participants meet in the hotel lobby.
- 9:00 am - 9:30 am**      Depart The Ivens Hotel en route to Champalimaud Center for the Unknown via shuttle (30 min). While in transit, a member of the Center Forward team will brief conference participants on the foundation's unique portfolio in Portugal and how it operates in the cancer research space.
- Champalimaud Foundation for the Unknown | Av. Brasília, 1400-038  
Lisboa, Portugal
- 9:30 am - 10:15 am**      Welcome Remarks and Presentation Overview — Question & Response
- Maria João Villas-Boas, Coordinator Institutional & Public Relations, Champalimaud Foundation
- Maria João Villas-Boas of the Champalimaud Foundation will welcome conference participants to the Champalimaud Foundation Cancer Research Center by providing an overview of the unique space in which this center operates. As one of the few cancer research facilities in Portugal, the Champalimaud Foundation is at the forefront of this critical area.*
- 10:15 am - 11:15 am**      Tour — Champalimaud Center for the Unknown
- Maria João Villas-Boas, Coordinator Institutional & Public Relations, Champalimaud Foundation
- Conference participants will be led on a brief visit to the Neuroscience, Cancer, and Experimental Clinical research laboratories within the Champalimaud Center, followed by a stop at the Botton-Champalimaud Pancreatic Cancer Center.*

**11:15 am - 11:45 am** Depart Champalimaud Foundation for the Unknown en route to lunch with the American Club of Lisbon (30 min). While in transit, a member of the Center Forward team will brief conference participants on the current business outlook in Portugal, and how American business is supporting the local economy.

American Club of Lisbon | Núcleo Central Taguspark, 2740-122  
Porto Salvo, Portugal

**11:45 am - 12:15 pm** The American Club of Lisbon — Meet and Greet with American and Portuguese Business Leaders

**12:15 pm - 12:30 pm** Welcome Remarks

- Anne C. Taylor, Executive Director, American Club of Lisbon

**12:30 pm - 2:00 pm** Panel Discussion — Strengthening Economic Ties — Lunch with the American Club of Lisbon.

- Diane Daudin Clavaud, Global Director Business Development, Nobu Hospitality
- Sheree M. Mitchell, Managing Partner, Bay Street Capital Holdings
- Eduardo Moradas, Chief Financial Officer, Bison Bank
- Anne C. Taylor, Executive Director, American Club of Lisbon

*The American Club of Lisbon is dedicated to enriching relations, both socially and in business between the people of Portugal and the United States of America. During this discussion, panelist will highlight the importance of American business investment in Portugal and the opportunities that have been created in the post-war world.*

**2:00 pm - 2:30 pm** Depart the American Club of Lisbon en route to the NOVA School of Business Economics (30 min). While in transit, a member of the Center Forward team will brief conference participants on the University Blockchain Research Initiative (UBRI) that NOVA has undertaken.

NOVA School of Business Economics | R. da Holanda 1, 2775-405  
Carcavelos, Portugal

**2:30 pm - 3:00 pm** Welcome Remarks & Presentation

- Leid Zejnilovic, Assistant Professor, NOVA School of Business Economics

*Leid Zejnilovic, Assistant Professor, NOVA School of Business Economics, will welcome conference participants to the university by providing a presentation on what the EU's approach to digital asset and blockchain regulation looks like, how the U.S. may be falling behind comparatively, and where areas of overlap exist.*

**3:00 pm - 4:00 pm**

Panel Discussion — Blockchain: Regulation in Portugal (EU) and First-Hand Experiences

- Ian Choo, Virtual Assets Lab Advisor, NovaSBE
- Antonio Henriques, Chief Executive Office, Bison Bank
- Nuno Lima de Luz, President, Portuguese Association of Blockchain and Cryptocurrencies and Senior Associate of Cuatrecasas
- Carlos Moura, Chief Technology Officer, Portuguese Central Bank
- Clara Raposo, Vice President, Portuguese Central Bank
- Michael Schmidt, Chief Executive Officer, Q Blockchain,

*Leaders in the financial industry will host a roundtable discussion to discuss their work on blockchain regulations across the industry, both in the U.S. and in Europe. This panel will share industry views on regulatory and policy developments and the innovation of cryptocurrency and blockchain technologies*

**4:00 pm - 4:30 pm**

Meet & Greet with conference participants

**4:30 pm - 5:00 pm**

Depart the NOVA School of Business Economics en route to The Ivens Hotel (30 min). While in transit, a member of the Center Forward team will debrief with conference participants on their takeaways from today's site visits, and what solutions can be brought back to Congress.

**DINNER ON YOUR OWN**



**Thursday, June 20, 2024**

**BREAKFAST ON YOUR OWN**

Breakfast is available in the Rocco Restaurant, located on the lobby floor, from  
6:30 am - 10:00 am

**\*\*Business attire.**

- 8:40 am** Conference participants meet in the hotel lobby.
- 8:45 am - 9:30 am** Depart The Ivens Hotel en route to Cubotonic (45 min). While in transit, a member of the Center Forward team will brief conference participants on the portfolio of Cubotonic and how they play a part in the advancement of the U.S. electronic vehicle transition.
- Cubotonic | Rua da Enomecanica , 1, Casal dos Faustinos, 2665-495 Venda do Pinheiro, Portugal
- 9:30 am - 9:45 am** Welcome Remarks
- Filipe Gregorio, CEO, Cubotonic
- Cubotonic is a leading manufacturer of electronic vehicle battery cabinets in both the United States and Portugal, producing chargers and power banks shipped around the world. Filipe Gregorio, CEO of Cubotonic, will welcome the delegation with a brief overview of the company's footprint in Portugal, Europe, and the United States.*
- 9:45 am - 10:15 am** Tour of Cubotonic Facility
- Tiago Cipriano, Director of Products, Cubotonic
- Tiago Cipriano, Director of Products, will lead the delegation on a tour of the Cubotonic facility. During this tour, participants will get an up-close view of each step in the manufacturing process, from design to the cutting of steel/aluminum, forging of materials, painting, and assembly.*
- 10:15 am - 11:00 am** Roundtable Discussion — The Infrastructure of the Electronic Vehicle Industry
- Luis Barros, Managing Director, i4 Sustainability

- Adam Owens, Head of Government Affairs Europe & Strategic Markets, Global Public Policy, General Motors
- Flavio Silva, Customer Manager, Cubotonic

*Following the facility tour, a seasoned group of experts will lead conference participants in a roundtable discussion on the renewable energy sector. Panelists will discuss where the industry is currently at and what the global community needs to do to reach the renewable energy goals set out. Participants will analyze the different approaches the United States and Portugal have taken, and how we can learn from each other in progressing our shared goals of advancing the electronic vehicle market.*

**11:00 am - 11:45 am** Depart Cubotonic en route to Pateo - Bairro do Avillez (45 min).

Pateo - Bairro do Avillez | R. Nova da Trindade 18, 1200-303 Lisboa, Portugal

**11:30 am - 1:00 pm** Lunch Remarks

- The Hon. Joaquim Miranda Sarmiento, Minister of Finance, Government of Portugal

*The Hon. Joaquim Miranda Sarmiento, Minister of Finance for the Portuguese government, will brief conference participants on the state of the Portuguese economy in a post-Covid world. Conference participants will discuss how our economies are intertwined in the global market, and how our two nations can work together to advance our mutual economic interests.*

**1:00 pm - 1:15 pm** Depart the Pateo - Bairro do Avillez en route to Assembleia da República (15 min). While in transit, a member of the Center Forward team will brief conference participants on the structure of the Portuguese Parliament and the outcome of recent elections in Portugal.

Assembleia da República | Praça da Constituição de 1976 1249-068 Lisboa, Portugal

**Conference participants will complete a security check-in upon arrival.**

**1:15 pm - 1:30 pm** Welcome Remarks

- The Hon. José Aguiar Branco, Speaker of Parliament, Government of Portugal

*The Hon. José Aguiar Branco, Speaker of Parliament, will welcome conference participants to the Portuguese Parliament and provide an overview of the newly formed government.*

**1:30 pm - 2:15 pm**

Tour of the Assembleia da República

**2:15 pm - 3:15 pm**

Interparliamentary Meetings

- The Hon. João Azevedo, Member of Parliament, Government of Portugal
- The Hon. Andreia Bernardo, Member of Parliament, Government of Portugal
- The Hon. Filipe Neto Brandão, Member of Parliament, Government of Portugal
- The Hon. Paula Cardoso, Member of Parliament, Government of Portugal
- The Hon. Franciso César, Member of Parliament, Government of Portugal
- Inês Coroa, Principal Advisor, Office of the Speaker
- The Hon. Mr. Pedro Duarte, Minister of Parliamentary Affairs, Government of Portugal
- The Hon. João Torres, Member of Parliament, Government of Portugal
- The Hon. Paulo Moniz, Member of Parliament, Government of Portugal
- The Hon. Alexandre Poço, Member of Parliament, Government of Portugal

U.S. Members of Congress will meet with their Portuguese counterparts in the Assembleia da República to discuss the U.S.-Portugal bilateral relationship, and how our two nations can continue working together on trade, security and economic relations.

**3:15 pm - 3:30 pm**

Depart the Assembleia da República en route to The Ivens Hotel (15 min).

**3:30 pm - 4:45 pm**

Break.

**4:45 pm - 5:00 pm**

Conference participants meet in the hotel lobby.

**5:00 pm - 5:30 pm**

Depart the Ivens Hotel en route to the Museum of Contemporary Art (30 min).

Museum of Contemporary Art | Praça do Império, 1449-003 Lisboa, Portugal

**5:30 pm - 6:45 pm**

Overview and tour of the Museum of Contemporary Art, followed by a farewell reception.

Spouses and children welcome.

- Angela Costa Simoes, Director, Portuguese American Leadership Council of the United States (PALCUS)

*Angela Costa Simoes, Director of PALCUS, will join our delegation to discuss the importance of the Portuguese-American business relationship, and how both nations benefit from a strong trade alliance.*

**6:45 pm - 7:00 pm**

Depart Museum of Contemporary Art via shuttle en route to Bistro 100 Maneiras (15 min).

Bistro 100 Maneiras | Largo da Trindade 9, 1200-466 Lisboa, Portugal

**7:00 pm - 9:30 pm**

Dinner

Spouses are welcome at dinner.

- The Hon. Minister Nuno Melo, Minister of Defense, Government of Portugal

*The Honorable Mr. Nuno Melo, Minister of Defense, will speak to conference participants on the security of Portugal and the EU. From the joint cooperation of the U.S. and its NATO allies in the STRIKFORNATO program to the security and support of our allies in the region, conference participants will have a robust discussion on global security, and how we can further work together to advance our mutual safety.*



**Friday, June 21, 2024**

**BREAKFAST ON YOUR OWN**

Breakfast is available in the Rocco Restaurant, located on the lobby floor, from  
6:30 am - 10:00 am

- 9:00 am - 9:15 am**      Conference participants meet in the hotel lobby
- 9:15 am - 9:45 am**      Members and staff depart The Ivens Hotel en route to Humberto Delgado International Airport (LIS) via shuttle (30 min).
- Humberto Delgado International Airport (LIS) | Alameda das Comunidades Portuguesas, 1700-111 Lisboa, Portugal
- 9:45 am - 10:15 am**      Members and staff complete check-in, security.
- 12:20 pm**                Members and staff depart Humberto Delgado International Airport (LIS)
- United Airlines Flight 943 | 8 h 10 min flight time
- 3:30 pm**                Arrive at Washington Dulles International Airport (IAD)

**Private Sponsor Travel Certification Form: Supplemental**

4.

| First        | Last      | Title                 | Affiliation                                  | Reason  |
|--------------|-----------|-----------------------|--|---|
| Earl "Buddy" | Carter    | Member of Congress    | Georgia 1st Congressional District           | As a Member of the House Committee on Energy and Commerce, Congressman Carter can speak to the advances and improvements in health outcomes made by cancer research.  |
| Chris        | Crawford  | Chief of Staff        | Office of Representative Earl "Buddy" Carter | In his role as Chief of Staff to a Member of the House Committee on Energy and Commerce, Mr. Crawford can share his perspective on the flow of commerce between the U.S. and our European Union allies, including Portugal.                               |
| Mark         | Dennin    | Chief of Staff        | Office of Representative Jimmy Panetta       | In his role as Chief of Staff to a Member of the House Committee on Ways and Means, Mr. Dennin can speak to the effect blockchain regulation will have on the economy.  |
| Edie         | Doman     | Legislative Assistant | Office of Representative Dave Joyce          | As Legislative Assistant to a Member of the House Committee on Appropriations, Ms. Doman can make valuable contributions to discussions about federal appropriations to support a variety of American businesses, including those with operations abroad. |
| Andrew       | Garbarino | Member of Congress    | New York's 2nd Congressional District        | As a Member of the House Committee on Financial Services, Congressman Garbarino can share his experience with evaluating blockchain technologies in the financial industry.   |
| David        | Joyce     | Member of Congress    | Ohio's 14th Congressional District           | As Chair of the House Appropriations Subcommittee on Homeland Security, Congressman Joyce will be able to engage his Portuguese counterparts in conversations about the impact of NATO on global security.  |
| Jake         | LaTurner  | Member of Congress    | Kansas's 2nd Congressional District          | As a Member of the House Committee on Oversight, Congressman LaTurner can share his perspective on Congress' oversight of international bodies such as NATO.  |

|        |          |                    |   |  |
|--------|----------|--------------------|---|--|
| Ricky  | Le       | Chief of Staff     | Office of Representative Linda Sanchez    | As Chief of Staff to a Member of the House Committee on Ways and Means, Mr. Le can share his insights on how a global minimum tax will affect the economic outlook and trade with countries such as Portugal.                                    |
| Susie  | Lee      | Member of Congress | Nevada's 3rd Congressional District       | As a Member of the House Committee on Natural Resources, Congresswoman Lee will contribute valuable insights during discussions about climate agreements with Portuguese officials and our mutual transition to a clean energy economy.          |
| Jimmy  | Panetta  | Member of Congress | California's 19th Congressional District  | As a Member of the House Committee on Armed Services, Congressman Panetta can share his perspective on military readiness and alliances, especially defensive treaties such as NATO.   |
| Andrew | Renteria | Chief of Staff     | Office of Representative David Valadao    | In his role as Chief of Staff to a Member of the House Committee on Appropriations, Mr. Renteria can speak to how labor regulations affect businesses in the U.S. and what we can learn from our allies in the European Union.                   |
| Linda  | Sanchez  | Member of Congress | California's 38th Congressional District  | As a Member of the House Committee on Ways and Means, Congresswoman Sanchez can share her perspective on the growing trade relationship between the U.S., Portugal, and the E.U.   |
| Haley  | Stevens  | Member of Congress | Michigan's 11th Congressional District    | As a Member of the House Committee on Science, Space, and Technology, Congresswoman Stevens can add valuable insights about the future of the electric vehicle industry.   |
| Eric   | Swalwell | Member of Congress | California 15th Congressional District    | As a Member of the House Committee on Homeland Security, Congressman Swalwell can speak to the impact of NATO on global security.  |
| Deena  | Tauster  | Chief of Staff     | Office of Representative Andrew Garbarino | As Chief of Staff to a Member of the House Committee on Homeland Security, Ms. Tauster can share her perspective on thwarting cybersecurity threats in the energy, defense and financial sectors, and its importance for U.S. national security. |

|         |         |                    |  |  |
|---------|---------|--------------------|--|--|
| Lauren  | Toy     | Chief of Staff     | Office of Representative Susie Lee       | In her role as Chief of Staff to a Member of the House Committee on Appropriations, Ms. Toy can speak to federal efforts to appropriate funding for cancer research.   |
| David   | Valadao | Member of Congress | California's 22nd Congressional District | As a Member of the House Committee on Appropriations, Congressman Valadao will add valuable insights into how the U.S. government is appropriating funding for the necessary infrastructure for electric vehicles (EVs). |
| Yardena | Wolf    | Chief of Staff     | Office of Representative Eric Swalwell   | As Chief of Staff to a Member of the House Committee on Judiciary, Ms. Wolf can contribute to conversations about protecting the IP of American businesses in the European market.                                       |

12. Sponsor's interest in the subject matter and role in organizing the trip:

Center Forward's International Issues Conference is being convened to bring together a bipartisan group of pragmatic policymakers and influencers from various industries and organizations to focus on common-sense solutions. Center Forward's organizational mission is to provide centrists the information they need to craft common-sense solutions and provide support in turning those ideas into results. Center Forward brings together Members of Congress, not-for profits, academic experts, trade associations, corporations, and unions to find common ground.

Center Forward is the sole organizer of the trip. Center Forward is planning the conference and is responsible for the organization and execution of the event logistics as well as the programming content. Discussion topics will include trade and foreign direct investment, healthcare, renewable energy, data privacy, and the strengthening of economic ties between the two countries' governments and business communities. Participants are expected to include policymakers, congressional staff, and advocate groups as well as business leaders and academic researchers.

15.b.2) Provide the reason for selecting the location of the event or trip:

Lisbon, Portugal was selected for this trip to provide U.S. lawmakers, policymakers, and business leaders an opportunity to engage with European business and political leaders on issues affecting both the American and Portuguese economies. As the two countries remain deeply intertwined and each has undergone significant political shifts, Portugal continues to be a major business hub with many major U.S. companies. This small, bipartisan delegation will focus on finding ways to increase shared economic growth and prosperity while attaining a greater understanding of how Portuguese leaders are addressing the challenges facing their nation, including the critical issue of regional security as further conflict arises in Europe. This visit will develop dynamic domestic and international programming to continue building the vital relationship that already exists between the two countries.