



# U.S. House of Representatives COMMITTEE ON ETHICS

## Employee Post-Travel Disclosure Form

Original  Amendment

This form is for disclosing the receipt of travel expenses from private sources for travel taken in connection with official duties. This form does not eliminate the need to report privately-funded travel on the annual *Financial Disclosure Statements* of those employees required to file them. In accordance with House Rule 25, clause 5, you must complete this form and file it with the Clerk of the House, B-81 Cannon House Office Building, 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: Brandon Casey
2. a. Name of Accompanying Relative: \_\_\_\_\_ OR None   
 b. Relationship to Traveler:  Spouse  Child  Other (specify): \_\_\_\_\_
3. a. Dates: Departure: \_\_\_\_\_ Return: \_\_\_\_\_  
 b. Dates at Personal Expense, if any: \_\_\_\_\_ OR None
4. Departure City: Dulles, VA Destination: Rome, Italy Return City: Dulles, VA
5. Sponsor(s), Who Paid for the Trip: Third Way Foundation
6. Describe Meetings and Events Attended: See addendum

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 *Grantmaking* or *Non-Grantmaking Sponsor Forms*;
  - c.  page 2 of the completed *Traveler Form* submitted by the employee; *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: \_\_\_\_\_

LEGISLATIVE RESOURCE CENTER  
219 NOV 26 PM 4:17  
OFFICE OF THE CLERK  
U.S. HOUSE OF REPRESENTATIVES

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

Signature of Traveler: [Signature] Date: 11/26/19

I authorized this travel in advance. I have determined that all of the expenses listed on the attached *Sponsor Post-Travel Disclosure Form* were necessary and that the travel was in connection with the employee's official duties and would not create the appearance that the employee is using public office for private gain.

Name of Supervising Member: [Signature] Date: 11/26/19

Signature of Supervising Member: [Signature]



# U.S. House of Representatives 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 on the trip *within ten 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 for the trip: Third Way Foundation

2. Travel Destination(s): Rome, Italy/ Brussels, Belgium / Paris, France

3. Date of Departure: 11/03/2019 Date of Return: 11/09/2019

4. Name(s) of Traveler(s): See Addendum

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	\$1380	\$924	\$659	
Accompanying Family Member				

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: 11/20/2019

Name: Lindsay Lewis Title: Executive Director

Organization: Third Way Foundation

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

Address: 1200 New Hampshire Ave NW Ste 575 Washington, DC 20036

Telephone: 202-525-3926 Email: llewis@ppionline.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.



U.S. House of Representatives

# COMMITTEE ON ETHICS

## TRAVELER FORM

1. Name of Traveler: Brandon Christopher Casey

2. Sponsor(s) who will be paying for the trip: Third Way Foundation

3. City and State OR Foreign Country of Travel: Rome, Italy; Brussels, Belgium; Paris, France

4. a. Date of Departure: November 3, 2019 Date of Return: November 9, 2019

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

If yes, list dates at personal expense: November 10th

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

(1) Name of Accompanying Family Member: \_\_\_\_\_

(2) Relationship to Traveler:  Spouse  Child  Other (specify): \_\_\_\_\_

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

6. a. 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)?  Yes  No

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

7. *Primary Trip Sponsor Form* is attached, including agenda, invitee list, and any other attachments and contributing sponsor forms:  Yes  No

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.

I am the staff director for the committee Dems and as such, it is important that I have a working relationship with our foreign counterparts to express to them the need for bilateral trade and investment. Also to provide an update on US thinking on digital sales taxes, multilateralism and the digital economy.

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

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

10/4/19



U.S. House of Representatives

# 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 website (ethics.house.gov) provides detailed instructions for filling out the form.

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.

1. Sponsor who will be paying for the trip: Third Way Foundation

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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 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: \_\_\_\_\_

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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): \_\_\_\_\_

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5. Is travel being offered to an accompanying family member of the House invitee(s)?  Yes  No
6. Date of Departure: November 3, 2019 Date of Return: November 9, 2019
7.
  - a. City of departure: Washington, D.C.
  - b. Destination(s): Rome, Italy/ Brussels, Belgium/ Paris, France
  - c. City of return: Washington, D.C.
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:
  - b. I checked 8(c) above but am not offering any lodging:
  - 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: \_\_\_\_\_



U.S. House of Representatives

# COMMITTEE ON ETHICS

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 that the statement is true by checking 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:  
Third Way Foundation is involved in policy solutions in the US and the impact that policy makes in Europe.  
Third Way Foundation organized all aspects of this trip.
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): \$200
    - 2) Provide the reason for selecting the location of the event or trip: Current policy decisions being made in Italy, France and EU that matter to Congress
16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
- |  |                                |                                 |
|--|--------------------------------|---------------------------------|
| Hotel Name: <u>Hotel Colonna</u>                     | City: <u>Rome, Italy</u>       | Cost Per Night: <u>\$190.00</u> |
| Reason(s) for Selecting: <u>Location to Meetings</u> |                                |                                 |
| Hotel Name: <u>Hilton Grand Place Hotel</u>          | City: <u>Brussels, Belgium</u> | Cost Per Night: <u>\$175.00</u> |
| Reason(s) for Selecting: <u>Location to Meetings</u> |                                |                                 |
| Hotel Name: <u>Hilton Paris Opera</u>                | City: <u>Paris, France</u>     | Cost Per Night: <u>\$200.00</u> |
| Reason(s) for Selecting: <u>Location to Meetings</u> |                                |                                 |
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 box:*



U.S. House of Representatives

# COMMITTEE ON ETHICS

18. Total Expenses for each Participant:

<input type="checkbox"/> Actual Amounts	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
<input checked="" type="checkbox"/> Good Faith Estimates			
For each Member, Officer, or Employee	\$1400.00	\$950.000	\$700.00
For each Accompanying Family Member	N/A	N/A	N/A

	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	N/A	N/A
For each Accompanying Family Member	N/A	N/A

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

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 that I am not a registered federal lobbyist or foreign agent for any sponsor of this trip.

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

Signature: \_\_\_\_\_ Date: 10/02/2019

Name: Lindsay Mark Lewis

Title: Executive Director

Organization: Third Way Foundation

Address: 1200 New Hampshire Ave NW, Ste 575, Washington DC 20036

Telephone: 202-525-3926

Email: llewis@ppionline.org

If there are any questions regarding this form, please contact the Committee at the following address:

### Committee on Ethics

U.S. House of Representatives

1015 Longworth House Office Building, Washington, D.C. 20515

Phone: 202-225-7103 General Fax: 202-225-7392



U.S. House of Representatives

# 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 website (ethics.house.gov) provides detailed instructions for filling out the form.

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.

1. Sponsor who will be paying for the trip: Third Way Foundation

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 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): \_\_\_\_\_

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

6. Date of Departure: November 3, 2019 Date of Return: November 9, 2019

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

b. Destination(s): Rome, Italy/ Brussels, Belgium/ Paris, France

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

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:

b. I checked 8(c) above but am not offering any lodging:

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: \_\_\_\_\_



U.S. House of Representatives

# COMMITTEE ON ETHICS

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 that the statement is true by checking 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:  
Third Way Foundation is involved in policy solutions in the US and the impact that policy makes in Europe.  
Third Way Foundation organized all aspects of this trip.
- 
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): \$200
  - 2) Provide the reason for selecting the location of the event or trip: Current policy decisions being made in Italy, France and EU that matter to Congress
16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
- |  |                                |                                 |
|--|--------------------------------|---------------------------------|
| Hotel Name: <u>Hotel Colonna</u>                     | City: <u>Rome, Italy</u>       | Cost Per Night: <u>\$190.00</u> |
| Reason(s) for Selecting: <u>Location to Meetings</u> |                                |                                 |
| Hotel Name: <u>Hilton Grand Place Hotel</u>          | City: <u>Brussels, Belgium</u> | Cost Per Night: <u>\$175.00</u> |
| Reason(s) for Selecting: <u>Location to Meetings</u> |                                |                                 |
| Hotel Name: <u>Hilton Paris Opera</u>                | City: <u>Paris, France</u>     | Cost Per Night: <u>\$200.00</u> |
| Reason(s) for Selecting: <u>Location to Meetings</u> |                                |                                 |
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 box:*





U.S. House of Representatives

# COMMITTEE ON ETHICS

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

<input type="checkbox"/> Actual Amounts	Total Transportation Expenses per Participant	Total Lodging Expenses per Participant	Total Meal Expenses per Participant
<input checked="" type="checkbox"/> Good Faith Estimates			
For each Member, Officer, or Employee	\$1400.00	\$950.000	\$700.00
For each Accompanying Family Member	N/A	N/A	N/A

	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	N/A	N/A
For each Accompanying Family Member	N/A	N/A


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

**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 that I am not a registered federal lobbyist or foreign agent for any sponsor of this trip.

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

Signature:  Date: 10/02/2019

Name: Lindsay Mark Lewis

Title: Executive Director

Organization: Third Way Foundation

Address: 1200 New Hampshire Ave NW, Ste 575, Washington DC 20036

Telephone: 202-525-3926

Email: llewis@ppionline.org

If there are any questions regarding this form, please contact the Committee at the following address:

**Committee on Ethics**  
 U.S. House of Representatives  
 1015 Longworth House Office Building, Washington, D.C. 20515  
 Phone: 202-225-7103 General Fax: 202-225-7392



U.S. House of Representatives  
**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 website (ethics.house.gov) provides detailed instructions for filling out the form.

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.

1. Sponsor who will be paying for the trip: Third Way Foundation
  
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 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): \_\_\_\_\_
  
5. Is travel being offered to an accompanying family member of the House invitee(s)?  Yes  No
  
6. Date of Departure: November 3, 2019 Date of Return: November 9, 2019
  
7. a. City of departure: Washington, D.C.  
 b. Destination(s): Rome, Italy/ Brussels, Belgium/ Paris, France  
 c. City of return: Washington, D.C.
  
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:
  - b. I checked 8(c) above but am not offering any lodging:
  - 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: \_\_\_\_\_



U.S. House of Representatives  
**COMMITTEE ON ETHICS**

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 that the statement is true by checking 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:  
Third Way Foundation is Involved in policy solutions in the US and the impact that policy makes in Europe.  
Third Way Foundation organized all aspects of this trip.
- 
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): \$140  
PD Italy → \$132; PD Brussels → \$167; PD Paris → \$169  
 2) Provide the reason for selecting the location of the event or trip: Current policy decisions being made in Italy, France and EU that matter to Congress
16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
- |  |                                |                                 |              |
|--|--------------------------------|---------------------------------|--------------|
| Hotel Name: <u>Hotel Colonna</u>                     | City: <u>Rome, Italy</u>       | Cost Per Night: <u>\$190.00</u> | <u>\$355</u> |
| Reason(s) for Selecting: <u>Location to Meetings</u> |                                |                                 |              |
| Hotel Name: <u>Hilton Grand Place Hotel</u>          | City: <u>Brussels, Belgium</u> | Cost Per Night: <u>\$175.00</u> | <u>\$167</u> |
| Reason(s) for Selecting: <u>Location to Meetings</u> |                                |                                 |              |
| Hotel Name: <u>Hilton Paris Opera</u>                | City: <u>Paris, France</u>     | Cost Per Night: <u>\$200.00</u> | <u>\$391</u> |
| Reason(s) for Selecting: <u>Location to Meetings</u> |                                |                                 |              |
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 box:*



U.S. House of Representatives

# COMMITTEE ON ETHICS

### 18. Total Expenses for each Participant:

<input checked="" type="checkbox"/> Actual Amounts <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	\$1400.00	\$950.000	\$700.00
For each Accompanying Family Member	N/A	N/A	N/A

	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	N/A	N/A
For each Accompanying Family Member	N/A	N/A

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

### 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 that I am not a registered federal lobbyist or foreign agent for any sponsor of this trip.

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

Signature:

Date: 10/02/2019

Name: Lindsay Mark Lewis

Title: Executive Director

Organization: Third Way Foundation

Address: 1200 New Hampshire Ave NW, Ste 576, Washington DC 20036

Telephone: 202-525-3926

Email: llewis@pponline.org

If there are any questions regarding this form, please contact the Committee at the following address:

### Committee on Ethics

U.S. House of Representatives

1015 Longworth House Office Building, Washington, D.C. 20515

Phone: 202-225-7103 General Fax: 202-225-7392

Theodore E. Deutch, Florida  
*Chairman*  
Kenny Marchant, Texas  
*Ranking Member*

Grace Meng, New York  
Susan Wild, Pennsylvania  
Dean Phillips, Minnesota  
Anthony Brown, Maryland

John Ratcliffe, Texas  
George Holding, North Carolina  
Jackie Walorski, Indiana  
Michael Guest, Mississippi



ONE HUNDRED SIXTEENTH CONGRESS

## U.S. House of Representatives

### COMMITTEE ON ETHICS

Thomas A. Rust  
*Staff Director and Chief Counsel*

David W. Arrojo  
*Counsel to the Chairman*

Christopher A. Donesa  
*Counsel to the Ranking Member*

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

October 30, 2019

Mr. Brandon Casey  
Committee on Ways and Means  
1102 Longworth House Office Building  
Washington, D.C. 20515

Dear Mr. Casey:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Italy, Belgium, France,<sup>1</sup> scheduled for November 3 to 9, 2019, sponsored by Third Way. We note that this trip includes one day at your personal expense.

You must complete an Employee Post-Travel Disclosure Form (which your employing Member must also sign) 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. If you are required to file an annual Financial Disclosure Statement, you must also report all travel expenses totaling more than \$390 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 employees may accept, under the Foreign Gifts and Decorations Act (FGDA), gifts "of minimal value [currently \$390] 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 Sergeant at Arms (SAA) for a safety and security briefing prior to your departure. SAA may be reached at (202) 226-2044 or [ohsstaff@mail.house.gov](mailto: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,



Theodore E. Deutch  
Chairman



Kenny Marchant  
Ranking Member

TED/KM:jls

## House Staff

Elle Anne Collins  
Tax Counsel  
Representative Tom Rice

*Elle Collins is Tax Counsel for Representative Tom Rice, who serves on the House Ways and Means Committee with jurisdiction over tax policy. This trip will contain programming related to digital taxation, the 2017 tax law, and international taxation issues.*

Matthew Steven Stross  
Tax Counsel  
Representative George Holding

*Matthew Stross is Tax Counsel for Representative George Holding, who serves on the House Ways and Means Committee with jurisdiction over tax policy. This trip will contain programming related to digital taxation, the 2017 tax law, and international taxation issues.*

Jacqueline Frances McGuinness  
Communications Director  
Representative Terri Sewell

*Jacqueline McGuinness is Communications Director for Representative Terri Sewell. This trip will contain programming related to a number of tax issues that require effective communication to the public. The trip will contain programming relating to the evolving European Union and The United States press relationships.*

Brooke McKay Lillard  
Communications Director  
Blue Dog Coalition

*Brooke Lillard is Communications Director for the Blue Dog Coalition. This trip will contain programming related to a number of tax issues that require effective communication to the public. The trip will contain programming relating to the evolving European Union and The United States press relationships.*

Emily Rebekah Simons  
Communications Director  
Representative Adam Schiff

*Emily Simons is Communications Director for Representative Adam Schiff. This trip will contain programming related to a number of tax issues that require effective communication to the public. The trip will contain programming relating to the evolving European Union and The United States press relationships.*

## House Staff

Kenneth Patrick Clifford  
Senior Legislative Assistant  
Representative Francis Rooney

*Kenneth Clifford is Senior Legislative Assistant for Representative Francis Rooney, advising the Congressman on budget and tax policy. This trip will contain programming related to digital taxation, the 2017 tax law, and international taxation issues.*

Julia Anne Prus  
Legislative Director  
Representative Brad Wenstrup

*Julia Prus is Legislative Director for Representative Brad Wenstrup, who serves on the House Ways and Means Committee with jurisdiction over tax policy. This trip will contain programming related to digital taxation, the 2017 tax law, and international taxation issues.*

Brandon Christopher Casey  
Staff Director  
House Ways and Means Committee

*Brandon Casey is Staff Director for the House Ways and Means Committee, which has jurisdiction over tax policy. This trip will contain programming related to digital taxation, the 2017 tax law, and international taxation issues.*

Elizabeth Lopez-Sandoval  
Communications and Special Projects Director  
Congresswoman Veronica Escobar

*Elizabeth Lopez-Sandoval is Communications and Special Projects Director for Congresswoman Veronica Escobar. This trip will contain programming related to a number of tax issues that require effective communication to the public. The trip will contain programming relating to the evolving European Union and The United States press relationships.*

Beth Bell  
Tax Counsel  
House Subcommittee on Select Revenue Measures

*Beth Bell is the Tax Counsel for the House Subcommittee on Select Revenue Measures. This trip will contain programming related to digital taxation, the 2017 tax law, and international taxation issues.*



## House Staff

Aaron Russell David White  
Communications Director  
Representative Sean Patrick Maloney

*Aaron White is Communications Director for Representative Sean Patrick Maloney. This trip will contain programming related to a number of tax issues that require effective communication to the public. The trip will contain programming relating to the evolving European Union and The United States press relationships.*

Natasha Barbara Dabrowski  
Communications Director and Senior Advisor  
New Democrat Coalition

*Natasha Dabrowski is Communications Director and Senior Advisor for the New Democrat Coalition. This trip will contain programming related to a number of tax issues that require effective communication to the public. The trip will contain programming relating to the evolving European Union and The United States press relationships.*

Lori Louise Prater  
Policy Director/Tax and Trade Counsel  
Representative Mike Kelly

*Lori Prater is Tax Counsel for Representative Mike Kelly, who serves on the House Ways and Means Committee with jurisdiction over tax policy. This trip will contain programming related to digital taxation, the 2017 tax law, and international taxation issues.*

Alexandra Marie White  
Legislative Director  
Representative Drew Ferguson

*Alexandra White is Legislative Director for Representative Drew Ferguson, who serves on the House Ways and Means Committee with jurisdiction over tax policy. This trip will contain programming related to digital taxation, the 2017 tax law, and international taxation issues.*

Ashley Marie Antoskiewicz  
Legislative Director  
Representative Darin LaHood

*Ashley Antoskiewicz is Legislative Director for Representative Darin LaHood, who serves on the House Ways and Means Committee with jurisdiction over tax policy. This trip will contain programming related to digital taxation, the 2017 tax law, and international taxation issues.*

## Monday, Nov 4

**10:00 - 11:30 am - Briefing and welcome on the week's schedule and meetings  
PPI staff**

**Colonna Palace Hotel, Piazza Montecitorio, 12 - 00186 Rome, Italy**

*We'll welcome all staff and leadership to our 2019 Codel by reviewing materials for the day ahead in Rome, answering questions, and briefing staff and leadership on biographies and individuals who will be meeting with us throughout the day.*

**12:00 - 2:00 pm - Lunch with Members Of Parliament**

**Victoire Maurel, Project manager, VOLTA**

**Giuliano da Empoli, journalist and founder of the think tank, VOLTA.**

**Gran Melia Hotel, Via del Gianicolo, 3, 00165 Roma RM, Italy**

*Over the lunch hour, we'll host a discussion on US-Italy relations with leaders from VOLTA, a think tank based in Italy. The conversation will include tax policy, digital policy, immigration, and more in relation to Italy's past, present, and future policy changes.*

**2:30 - 3:30 pm - Meeting with Italian MPs**

**Maria Cecilia Guerra, Undersecretary of Economy and Finance**

**Italian Parliament Building, Piazza di Monte Citorio, 00186 Roma RM, Italy**

*Staff and leadership will meet with Italian MPs as well as Maria Cecilia Guerra, the Undersecretary of Economy and Finance, to discuss the state of the economy and finance policy in Italy, as well as their relationship to the EU and other topics.*

**4:00 - 5:30 pm - Meeting with Italian political experts**

**Claudio Lodici, Professor of Comparative Government, at Loyola University Chicago.**

**Italian Parliament Building, Piazza di Monte Citorio, 00186 Roma RM, Italy**

*Discussion on Italy's new governing coalition with Italian political experts including Claudio Lodici, who will lead staff and leadership in a conversation on broad Italian policy objectives and the state of politics in Italy in the modern world.*

**7:00 - 10:00 pm - Dinner discussion on Italian politics**

**Trisha Thomas, AP correspondent in Rome and president of the foreign press;  
and Luigi Petrella, PhD, journalist and former analyst with Italy's major financial outlet, *Il Sole 24 Ore*.**

**Restaurant Rimessa Roscioli, Via Del Conservatorio 58, Rome**

*Staff and leadership will meet with Trisha Thomas to learn about the role of press and media in the modern age of Italian politics. The conversation will also include topics relating to coverage of political leaders in Italy, across western Europe, and in other western nations.*

## Tuesday, Nov 5

**7:00 - 8:00 AM - Breakfast and debrief/preview of the day**

**PPI Staff**

**Colonna Palace Hotel, Piazza Montecitorio, 12 - 00186 Rome, Italy**

**Hilton Brussels Grand Palace, Carrefour de l'Europe 3, 1000 Bruxelles, Belgium**

*We'll discuss the events of the previous day in Rome and preview meetings and biographies for Brussels meetings, as well as brief staff on policy discussions and topics that will be addressed throughout the day's programming.*

**3:00 - 4:30 pm - Meeting with American Chamber of Commerce EU**

**Susan Danger, CEO**

**Hilton Brussels Grand Palace, Carrefour de l'Europe 3, 1000 Bruxelles, Belgium**

*As new leadership takes office, we will engage with Susan Danger about the changing dynamics between the European Union and the United States on issues of international taxation, political cooperation, and competition policy.*

**4:30 - 6:00 pm - Meeting to discuss digital policy with Directorate-General for Connect**

**Menno Cox, Legal & Policy Officer, DG Connect**

**Hilton Brussels Grand Palace, Carrefour de l'Europe 3, 1000 Bruxelles, Belgium**

*Discussion will include topics like regulation of platforms, the Digital Services Act, and priorities of the new European Commission in digital policy. Staff and leadership will have the opportunity to converse with experts on the evolution of digital policy in the EU and across the globe.*

**6:00 - 7:30 pm - Reception**

**EU Parliament and Commission Staff**

**KWINT, Mont des Arts 1, 1000 Brussels**

*EU Parliament and Commission Staff will join our staff and leadership for a reception where guests will have the opportunity to connect, network, and learn about the roles and responsibilities of leadership in these fields.*

**8:00 - 10:30 pm - Dinner discussion**

**Guests from EU institutions**

**Restaurant Au Vieux, Saint-Martin Place du Grand Sablon 38, 1000 Bruxelles**

*This dinner discussion will focus on a transatlantic dialogue, hearing from guests from EU institutions on the changing dynamics of the EU in the modern age. Staff and leadership will also have the opportunity to connect with others to discuss the modern era of politics across Europe and the United States.*

## Wednesday, Nov 6

**8:00 - 9:00 am - Debrief and preview briefing**

**PPI staff**

**Hilton Brussels Grand Palace, Carrefour de l'Europe 3, 1000 Bruxelles, Belgium**

*We'll discuss the events of the previous day and preview meetings and biographies for Brussels meetings, as well as brief staff on policy discussions and topics that will be addressed throughout the day's programming.*

**9:00 - 11:00 am - Meet with Directorate-General for Competition**

**Commissioner Margrethe Vestager**

**Madou Tower, Chaussée de Louvain 3, 1210 Saint-Josse-ten-Noode**

*At this meeting, we'll discuss recent developments in EU Competition Policy and priorities of a new European Commission in competition policy.*

**11:30 - 12:30 pm - Meet with Directorate-General for Trade**

**Commissioner Cecilia Malmström**

**Madou Tower, Boulevard Charlemagne 170, 1000 Bruxelles, Belgium**

*At this pre-lunch discussion, staff and leadership will engage in conversation over EU-US trade relations and new priorities in trade from the European Commission.*

**1:00 - 2:30 pm - Lunch parliament meeting**

**Members of the European Parliament**

**Private Room, European Parliament Rue Wiertz 60, 1047, Brussels, Bruxelles**

*Staff and leadership will be joined during the lunch hour by members of the European Parliament to get a first-hand look at the operations, structure, and activities that members participate in and experience during debate, conversation, and policy-making.*

**2:45 - 4:00 pm - Meeting with EU Staff**

**European Union Parliament Staffers**

**Private Room, European Parliament Rue Wiertz 60, 1047 Brussels, Bruxelles**

**Group 1 - EP Structure, Group 2 - Communications**

*Staff and leadership will split into groups, with one group meeting with staffers to learn about the structure of the European Parliament, and the second group meeting staffers to discuss the communications structure for an entity that covers multiple cultures, countries, and languages.*

**4:30 - 5:30 pm - Meeting with MPs**

**Representatives from the governments of Ireland, the Netherlands, and Luxembourg**

**Private Room, European Parliament Rue Wiertz 60, 1047 Brussels**

*Prior to dinner, staff and leadership will participate in unique conversations with representatives from three different EU governments, learning how each country participates in the combined entity, and the challenges and opportunities that staff experience.*

## Third Way Foundation Staff Delegation Schedule

**8:00 - 10:00 pm - Dinner Discussion with selected EU guests**

**Restaurant La Maison du Cygne - Grand Place 9, 1000 Bruxelles, Belgium**

*Selected EU guests will join staff and leadership for the final dinner in Brussels to discuss the EU as it heads into the future, and what the EU looks like in the months, years, and decades ahead.*

## Thursday, Nov 7

**7:15 - 8:15 am - Breakfast debrief of Debrief and preview briefing**

**PPI staff**

**Hilton Brussels Grand Palace, Carrefour de l'Europe 3, 1000 Bruxelles, Belgium**

*We'll discuss the events of the previous day in Brussels and preview meetings and biographies for Paris meetings, as well as brief staff on policy discussions and topics that will be addressed throughout the day's programming.*

**12:00 - 3:00 pm - Meeting on digital tax, tax structures, and regulations**

**OECD 2 Rue André Pascal, 75016 Paris, France**

*This meeting will give staff and leadership the opportunity to learn about the evolution of Europe's tax structure, specifically that of France, as well as a discussion on digital taxes and innovation. Discussion topics will include the rightful claims to revenue via digital taxes on American businesses, the change in tax structures given globalizing markets and evolving industries, and what international tax challenges were created or solved by the 2017 tax law.*

**3:30 - 4:30 pm U.S. Embassy Meeting**

**2 Avenue Gabriel, 75008 Paris, France**

*We will engage with leaders from the United States Embassy about the changing dynamics between the European Union and the United States on issues of international taxation, economic evolution, and political cooperation.*

**7:00 - 10:00 pm - Dinner**

**Lapérouse - 51 Quai des Grands Augustins, 75006 Paris, France**

*How does Europe's treatment of growing immigrant and refugee populations compare to the US, and what is the Macron Vision for Europe? This dinner will be an open dialogue and intense discussion on these topics and the changing political dynamic across the western world.*

## Friday, Nov 8

**8:00 - 9:00 am - Breakfast, debrief, and day preview**

**PPI Staff**

**Hilton Paris Opera, 108 Rue Saint-Lazare, 75008 Paris, France**

*We'll discuss the events of the previous day and preview meetings and biographies for Paris meetings, as well as brief staff on policy discussions and topics that will be addressed throughout the day's programming.*

**10:00 - 11:30 am - Meeting with Executive Branch Staff**

**Clément Beaune, Advisor Europe and G20; Charles-Henri Weymuller, Advisor, Macroeconomic policy and Trade; Hugo Vergès, Advisor, Transatlantic relations; and Laurent Martel, Advisor, Tax**

**Elysée, 55 Rue du Faubourg Saint-Honoré, 75008 Paris, France**

*Staff and leadership will meet with executive branch staff from France, discussing the everyday operations of the branch and its interconnectivity with other branches of French government. Staff will additionally have the opportunity to discuss tax, transatlantic relations, economic policy and trade, and G20 topics with professional staff from the executive branch, and learn of their roles within its operation directly from leadership.*

**12:00 - 2:00 pm - Lunch meeting at Google France**

**US and EU policy tech leaders**

**8 Rue de Londres, 75009 Paris, France**

*As technology continues to change the world and how we look at global connectivity, staff and leadership will meet with U.S. Tech Leaders during a luncheon at Google France. This luncheon will provide an opportunity to connect with tech leaders and learn how connectivity and technology is changing the way France's decision-makers and economic leaders operate.*

**2:00 - 4:00 pm - Confrontations Europe Think Tank**

**Meeting with French MPs**

**227 boulevard Saint-Germain, 75007 PARIS**

*Staff and leadership will meet with leaders from Confrontations Europe, a European think tank founded in 1992, and has served as a non-partisan association of policymakers, researchers, and decision-makers from across Europe. This meeting gives staff the opportunity to ask questions of policy processes, and how Confrontations builds relationships with decision-makers from across Europe.*

**6:00 - 8:00 pm - Dinner discussion at Hilton Paris Opera**

**PPI Staff**

**108 Rue Saint-Lazare, 75008 Paris, France**

*This dinner will provide time for debrief and collaboration on the events of the code between staff and leadership, contrasting our unique programming in Paris with that of our meetings with EU leaders in Brussels and Italian leaders in Rome.*