Employee Post-Travel Disclosure Form

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: Shiouyu Theresa Lou

2. a. Name of Accompanying Relative: ___________________________ OR None ☐
   b. Relationship to Traveler: ☐ Spouse ☐ Child ☐ Other (specify): ___________________________

   b. Dates at Personal Expense, if any: ___________________________ OR None ☐


5. Sponsor(s), Who Paid for the Trip: Information Technology and Innovation Fund

6. Describe Meetings and Events Attended: I participated in sessions pertaining to AI, American competitiveness, fifth-generation technology, and other technological innovations.

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: I did not participate in the Congressional Staff Panel on Saturday evening, as I did not receive permission from my office prior to departure to participate on said panel.

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

Signature of Traveler: ___________________________ Date: 2/28/2020

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: ___________________________ Date: 2/28/2020

Signature of Supervising Member: ___________________________
Sponsor Post-Travel Disclosure Form

This form must be completed by an officer of any organization that served as the primary trip sponsor in providing travel expenses or reimbursement for travel expenses to House Members, officers, or employees under House Rule 25, clause 5. A completed copy of the form must be provided to each House Member, officer, or employee who participated 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: Information Technology and Innovation Foundation (ITIF)

2. Travel Destination(s): San Juan, Puerto Rico

3. Date of Departure: February 20, 2020 Date of Return: February 23, 2020

4. Name(s) of Traveler(s): Shonna Theresa Lou

   Note: You may list more than one traveler on a form only if all information is identical for each person listed.

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

<table>
<thead>
<tr>
<th></th>
<th>Total Transportation Expenses</th>
<th>Total Lodging Expenses</th>
<th>Total Meal Expenses</th>
<th>Total Other Expenses (dollar amount per item and description)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traveler</td>
<td>$621</td>
<td>$825</td>
<td>$458</td>
<td>$1500 Waived Registration Fee</td>
</tr>
<tr>
<td>Accompanying Family Member</td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

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: [Signature] Date: 2/27/2020

Name: Jackie Whisman Title: Vice President

Organization: Information Technology and Innovation Foundation

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

Address: 700 K Street NW, Suite 600, Washington DC 20001

Telephone: (202) 626-5748 Email: jwhisman@itif.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.
TRAVELER FORM

1. Name of Traveler: Shiouyu Theresa Lou

2. Sponsor(s) who will be paying for the trip: Information Technology and Innovation Foundation

3. City and State OR Foreign Country of Travel: San Juan, Puerto Rico

4. a. Date of Departure: February 20, 2020 Date of Return: February 23, 2020
   b. Will you be extending the trip at your personal expense? Yes ☐ No ☐
      If yes, list dates at personal expense: ________________

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.
   As a policy analyst for the House Foreign Affairs Committee covering issues related to the Indo-Pacific, this retreat would offer me an opportunity to better understand the policy implications regarding technology innovation, particularly on issues related to U.S.-China strategic competition.

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: [Signature] Date: 1/17/2020
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: Information Technology and Innovation Foundation (ITIF)

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): See Attachment 1

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

6. Date of Departure: February 20, 2020 Date of Return: February 23, 2020

7. a. City of departure: Washington, DC
   b. Destination(s): San Juan, PR
   c. City of return: Washington, DC

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:

Version date 12/2018 by 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:
   ITIF is a 501(c)(3) non-profit organization founded in 2006 whose mission is to formulate and promote public policies to advance innovation. Our fifth policy retreat will bring together leaders from business, government, and academia to facilitate discussions about the innovation challenges facing our nation.

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):
   ____________________________
   2) Provide the reason for selecting the location of the event or trip:

16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
   Hotel Name: Caribe Hilton
   City: San Juan, Puerto Rico
   Cost Per Night: $275
   Reason(s) for Selecting: Availability of rooms and event space, pricing, proximity to major airport.
   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 box: ☑
18. Total Expenses for each Participant:

<table>
<thead>
<tr>
<th></th>
<th>Total Transportation Expenses per Participant</th>
<th>Total Lodging Expenses per Participant</th>
<th>Total Meal Expenses per Participant</th>
</tr>
</thead>
<tbody>
<tr>
<td>For each Member, Officer, or Employee</td>
<td>$600</td>
<td>$825</td>
<td>$200</td>
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<tr>
<td>For each Accompanying Family Member</td>
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</table>

Other Expenses (dollar amount per item) and Identify Specific Nature of “Other” Expenses (e.g., taxi, parking, registration fee, etc.)

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<tr>
<th></th>
<th>Other Expenses (dollar amount per item)</th>
<th>Identify Specific Nature of “Other” Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>For each Member, Officer, or Employee</td>
<td></td>
<td></td>
</tr>
<tr>
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</tr>
</tbody>
</table>

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: [Signature] Date: 1/15/2020

Name: Jackie Whisman
Title: Vice President
Organization: Information Technology and Innovation Foundation
Address: 700 K Street NW, Suite 600, Washington DC 20001
Telephone: (202) 626-5748
Email: jwhisman@itif.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

Version date 12/2018 by Committee on Ethics
February 14, 2020

Ms. Theresa Lou
Committee on Foreign Affairs
2170 Rayburn House Office Building
Washington, DC 20515

Dear Ms. Lou:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to San Juan, Puerto Rico, scheduled for February 20 to 23, 2020, sponsored by Information Technology and Innovation Foundation (ITIF).

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.

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: mso
ITIF'S FIFTH ANNUAL INNOVATION POLICY RETREAT
February 20 – 22, 2020 | Caribe Hilton | San Juan, Puerto Rico

Thursday, February 20, 2020

8:15 AM United Airlines Flight 2021 Departs Dulles International Airport (IAD)

1:01 PM United Airlines Flight 2021 Arrives San Juan International Airport (SJU)

1:30 – 2:15 PM Travel Time from SJU (boxed lunch provided)

2:30 – 4:30 PM “Rebuilding Puerto Rico” Service Event with University of Puerto Rico Mentors and High School Student Innovators from Bayamón, Puerto Rico

ITIF has organized a monthlong collaboration between University of Puerto Rico technologists and high school students from five public schools in which the high school innovators will identify a public challenge and use technology to solve it. Many of the projects will be related to rebuilding the island's technology infrastructure. The students and their University mentors will present their work and findings to our group and accept feedback and additional mentorship from attendees.

Program Timing: Introductions by Rob Atkinson, ITIF (10 min); Student Presentations (15 min each/75 min total); Q&A (35 min)

5:30 – 7:00 PM Welcome Reception

7:00 – 8:30 PM Dinner + Fireside Chat with Commissioner Geoffrey Starks, Federal Communications Commission

Program Timing: Dinner Buffet (30 min); Moderated Fireside Chat (30 min); “Innovation Trivia” Icebreaker (30 min)

Friday, February 21, 2020

Theme: Innovation and Competitiveness

8:00 – 8:30 AM Breakfast

8:30 – 9:00 AM Welcome Remarks: Congressman Darren Soto (FL-09)

9:15 – 10:45 AM Breakout Sessions

- Genomics, Data and the Future of Drug Innovation (Moderated by Stephen Ezell, ITIF)
- IoT and Smart Cities: Achieving the Promise (Moderated by Daniel Castro, ITIF)
- Techlash: What to Do (Moderated by Rob Atkinson, ITIF)
- The Rural Broadband Dilemma: Challenges and Solutions (Moderated by Doug Brake, ITIF)
12:30 – 1:45 PM  Panel: International Internet Policy Issues
Moderator: Nigel Cory, Associate Director, Trade Policy, ITIF
Confirmed: Shannon Coe, International Trade Administration

2:00 – 3:30 PM  Panel: Section 230 and Tech Liability
Moderator: Daniel Castro, Vice President, ITIF and Director of ITIF’s Center for Data Innovation
Confirmed: Dagmar Bartels, OLX Group; Mike Castellano, The Walt Disney Company; Jamie Susskind, Consumer Technology Association

5:00 – 6:30 PM  Reception

6:30 – 8:00 PM  Dinner + Congressional Staff Panel: Innovation Policy in the 116th Congress
Erica Andrew, Senator Deb Fischer
Lyndsey Barnes, Rep. Brian Higgins
Moira Bergin, House Homeland Security Committee
Sasha Bernhard, Rep. Suzan DelBene
Roddy Flynn, Rep. Mary Gay Scanlon
Aruna Kalyanam, House Ways & Means Committee
John Lin, Senate Commerce Committee
Theresa Lou, House Foreign Affairs Committee
Kurt Lynch, Senator Catherine Cortez Masto
Stephen Newton, Senator Mitt Romney
Dao Nguyen, House Future Forum/Rep. Stephanie Murphy
George Redden, Senator Jerry Moran
Jacob Reses, Senator Josh Hawley
Dan Smith RuBoss, Rep. Lloyd Doggett
Mimi Strobel, Senator Ron Johnson
Troy D. Stock, Senate Republican Policy Committee
Nicole Varner, Rep. Mark Veasey
Conor Walsh, Rep. Tom Suozzi
Austin Walton, Rep. Tim Walberg/Whip Steve Scalise

Sunday, February 23, 2020

9:00 AM  Breakfast Buffet Available
11:00 AM  Hotel Check Out
12:30 PM  Flight Check In
1:56 PM  United Flight 2022 Departs SJU
4:50 PM  United Flight 2022 Arrives IAD
Attachment 1: Congressional Invitees:

These Members and staffs were invited to attend because of their relevant work and jurisdiction on the innovation policy issues we plan to cover at the event, including broadband, intellectual property, antitrust, internet, emerging technologies, and international competitiveness.

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<td>House Democratic Majority Leader Steny Hoyer</td>
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<td>Liz</td>
<td>Amster</td>
<td>Rep. Kathleen Rice</td>
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<td>Erica</td>
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<td>Moira</td>
<td>Bergin</td>
<td>Cybersecurity, Infrastructure Protection and Innovation Subcommittee</td>
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<td>Sasha</td>
<td>Bernhard</td>
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<td>Marsha</td>
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<td>Susan</td>
<td>Brooks</td>
<td>U.S. House of Representatives</td>
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<td>Angela</td>
<td>Brown</td>
<td>Rep. Darren Soto</td>
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<td>Aimee</td>
<td>Collins-Mandeville</td>
<td>Rep. Val Demings</td>
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<td>Becky</td>
<td>Cornell</td>
<td>COS, Pete Aguilar</td>
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<td>Alexandrine</td>
<td>De Bianchi</td>
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<td>Max</td>
<td>Ernst</td>
<td>Rep. Abby Finkenauer</td>
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<td>Adam</td>
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<td>Deb</td>
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<td>Rep. Mary Gay Scanlon</td>
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<td>Mike</td>
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<td>Senate Homeland Security and Governmental Affairs Committee</td>
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<td>Justin</td>
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<td>Lisa</td>
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<td>Consumer Protection Subcommittee, House Energy &amp; Commerce Committee</td>
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<td>Troy D.</td>
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<tr>
<td>Jessica</td>
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<td>U.S. Senator Marsha Blackburn</td>
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<td>Walsh</td>
<td>Rep. Suozzi</td>
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<td>Webb</td>
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<td>Jay</td>
<td>Weismuller</td>
<td>U.S. Senator Maggie Hassan</td>
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<td>Carolina</td>
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