



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, by email at gifttravelreports@mail.house.gov, within 15 days after travel is completed. Please do not file this form with the Committee on Ethics.

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

- 1. Name of Traveler: Kelsey Wolfgram
2. a. Name of Accompanying Relative: OR None
b. Relationship to Traveler: Spouse Child Other (specify)
3. a. Dates: Departure: June 1 2023 Return: June 3 2023
b. Dates at Personal Expense, if any: OR None
4. Departure City: Washington DC Destination: New York, NY Return City: Washington, DC
5. Sponsor(s), Who Paid for the Trip: The Third Way Foundation (Progressive Policy Institute is a project of Third Way Foundation)
6. Describe Meetings and Events Attended: Discussion on public sentiment surrounding the debt limit with a journalist and data scientist; briefing on businesses' economic growth concerns; presentation on the US economic outlook with a chief economist; review of monetary policy at the New York Fed; panel discussion on borrowing with risk assessment professionals.
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 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 certify that the information contained on this form is true, complete, and correct to the best of my knowledge.

Signature of Traveler: [Signature] Date: 06/12/2023

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: Rep. Tim Burchett (TN-02) Date: 06/12/2023

Signature of Supervising Member: [Signature]



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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 delivered to the Committee at 1015 Longworth or e-mailed to 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: Kelsey Wolfgram

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: _____

Name of Signatory (if other than traveler): _____

For Staff (name of employing Member or Committee): Rep. Tim Burchett (TN-02)

Office Address: 1122 LHOB

Telephone Number: 202-823-2225

Email Address of Contact Person: kelsey.wolfgram@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 e-mail: travel.requests@mail.house.gov.



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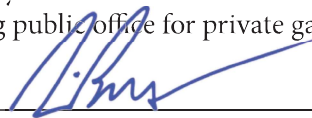
TRAVELER FORM

1. Name of Traveler: Kelsey Wolfgram
2. Sponsor(s) who will be paying or providing in-kind support for the trip:
The Third Way Foundation (Progressive Policy Institute is a project of Third Way Foundation)
3. City and State **OR** Foreign Country of Travel : New York City, New York
4. a. Date of Departure: June 1, 2023 Date of Return: June 3, 2023
b. Yes No Will you be extending the trip at your personal expense?
If yes, list dates at personal expense: _____
5. a. Yes No Will you be accompanied by a family member at the sponsor's expense? **If yes:**
(1) Name of Accompanying Family Member: _____
(2) Relationship to Traveler: Spouse Child Other (specify): _____
(3) Yes No Accompanying Family Member is at least 18 years of age:
6. a. Yes No Did the trip sponsor answer "Yes" to Question 8(c) on the *Primary Trip Sponsor Form* (i.e., travel is sponsored by an entity that employs a registered federal lobbyist or a foreign agent)?
b. **If yes**, and you are requesting lodging for two nights, explain why the second night is warranted:
7. Yes No *Primary Trip Sponsor Form* is attached, including agenda, 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.
As Deputy Chief of Staff and the senior most legislative staffer handling financial services issues for the Congressman, this trip will help inform my understanding of the real-world implications and effects of policy related to our nation's debt and deficit, and provide me the opportunity to connect with colleagues and key stakeholders in the space.
9. **Yes No Is the traveler aware of any registered federal lobbyists or foreign agents involved planning, organizing, requesting, or arranging the trip?**
10. For staff travelers, to be completed by your employing Member:

ADVANCED AUTHORIZATION OF EMPLOYEE TRAVEL

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

Signature of Employing Member  Date May 2, 2023



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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:
The Third Way Foundation (Progressive Policy Institute is a project of 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):

Attached below.
5. Yes No Is travel being offered to an accompanying family member of the House invitee(s)?
6. Date of departure: June 1, 2023 Date of return: June 3, 2023
7. a. City of departure: Washington, D.C.
b. Destination(s): New York, NY
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; **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:



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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:
The Third Way Foundation has been conducting policy work and facilitating educational dialogues on fiscal and monetary issues since in 1989. The meetings on this trip will take into account congressional staff interest and their relevance to shared policy objectives of PPI and the attending staff, focusing specifically on three key themes (1) the federal debt limit (2) inflation, interest rates, & long-term debt trajectory (3) the impact of fiscal and monetary on bank stability.
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 the 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):
Average of \$48 per day (6/1 one meal provided, 6/2 three meals, 6/3 one meal)
- 2) Provide the reason for selecting the location of the event or trip:
NYC is home to several global financial institutions, academics, and relevant media
16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:
Hotel Name: Kimberly Hotel City: New York, NY Cost Per Night: \$240
Reason(s) for Selecting: Centrally located, nice accommodations, cost under federal per diem
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.*



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18. Total Expenses for each Participant:

<input 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	\$300	\$520	\$144
For each Accompanying Family Member			

	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	\$20	Taxi if needed
For each Accompanying Family Member		

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 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: 4/28/2023

Name: Lindsay Lewis Title: Executive Director

Organization: The Third Way Foundation

Address: 1156 15th Street NW, Ste 400, Washington, D.C. 20005

Email: llewis@ppionline.org Telephone: (202) 617-4042

INSTRUCTIONS

Complete the *Primary Trip Sponsor Form* and submit the agenda, invitation list, any attachments, and any *Additional Trip Sponsor Forms* directly to the Travelers.

Written approval from the Committee on Ethics is required before traveling on this trip. The Committee on Ethics will notify the House invitees directly and will not notify the trip sponsors.

Willful or knowing misrepresentation on this form may be subject to criminal prosecution under 18 U.S.C. § 1001. Signatures must comply with section 104(bb) of the Travel Regulations.

For questions, please contact the Committee on Ethics at:

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

ethicscommittee@mail.house.gov | 202-225-7103
More information and forms available at ethics.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

Kelle A. Strickland
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

May 18, 2023

Ms. Kelsey Wolfgram
Office of the Honorable Tim Burchett
1122 Longworth House Office Building
Washington, DC 20515

Dear Ms. Wolfgram:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to New York City, New York, scheduled for June 1 to 3, 2023, sponsored by the Third Way Foundation.

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 \$480 from a single source on the "Travel" schedule of your annual Financial Disclosure Statement covering this calendar year. Finally, Travel Regulation § 404(d) also requires you to keep a copy of all request forms and supporting information provided to the Committee for three subsequent Congresses from the date of travel.

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

Sincerely,

Michael Guest
Chairman

Susan Wild
Ranking Member

MG/SW:tn



PPI StaffDel to New York, NY – June 1-3, 2023

Thursday, June 1, 2023

1:10 - 4:42 pm

Train: 148 Northeast Regional from WAS to NYP

5:00pm

Travel to hotel - subway

6:00 pm

Check in at hotel, drop bags

Location: Kimberly Hotel, 145 E 50th St, New York, NY 10022

7:15pm

Travel to dinner - walk or taxi

7:30 pm - 9:30 pm

Fiscal policy dinner discussion with Catherine Rampell, David Shor, and Columbia University

Location: Columbia Club, 30 W 44th St, New York, NY 10036

Special guests at the dinner will be Catherine Rampell, an opinion journalist and nationally syndicated opinion columnist; David Shor, a data scientist and political consultant; and academics at Columbia University. We will discuss the fiscal challenges facing the United States, the debt limit debate, and how these issues are perceived by and communicated to the general public.

Friday, June 2, 2023

8:30-10:00 am

Breakfast Briefing on National Debt

Location: Kimberly Hotel, Conference Space, 145 E 50th St, New York, NY 10022

Briefing will provided by a senior economist at Willett Advisors LLC, a NYC-based investment management company. The presentation will cover the national debt and the implications it could have for economic growth.

10:00am

Travel to meeting - subway or taxi

10:30-12:30pm

U.S. Economic Outlook Meeting with Beth Ann Bovino

Location: Apco, Conference Room, 1250 Broadway 31st floor, New York, NY 10010

Beth Ann Bovino is widely renowned economic and market research analyst. The Wall Street Journal recognized Beth Ann as the most accurate forecaster of the U.S. economy in 2013 and the 2nd most



accurate forecaster in 2018. Beth Ann will discuss the U.S. economic outlook and how failing to raise or suspend the federal debt limit would affect it. Light lunch will be served following the meeting.

12:30pm

Travel to meeting - subway or taxi

1:30 - 2:45 PM

Discussion with Risk Assessment Professionals

Location: Moody's, 7 World Trade Center, 250 Greenwich St, New York, NY 10007

Moody's is one of the major three main independent rating agencies in the United States. Staff will receive a briefing from risk assessment professionals on the impact of debt-limit brinkmanship on U.S. borrowing.

2:45pm

Travel to meeting - subway or taxi

3:00 - 5:00 PM

Visit to Federal Reserve Bank of New York

Location: 33 Liberty Street, New York, NY 10045

The mission of the Federal Reserve Bank of New York is to make the U.S. economy stronger and the financial system more stable for all segments of society. Staff will meet with economists at the Fed to discuss the impact of monetary policy on inflation and bank stability, and embark on a guided tour.

5:00pm

Travel to hotel - subway or taxi

6:00 - 8:00 pm

Reception with PPI Leadership and Financial Experts

Location: Kimberly Hotel, 145 E 50th St, New York, NY 10022

Staff will meet with PPI leadership and reconvene with experts from private sector, media and academia met during the day's programming for a reception and pizza dinner to recap the trip and discuss lessons learned.

Saturday, June 3, 2023

11:05 - 2:28 pm

Train: 195 Northeast Regional from NYP to WAS

U.S. House Staff Invitees
PPI StaffDel to New York, NY – June 1-3, 2023

Brian Duckworth
Legislative Director/Senior Adviser
Rep. Jeff Jackson
brian.duckworth@mail.house.gov

Aaron Groce
Legislative Director
Rep. Sean Casten
Aaron.Groce@mail.house.gov

Trey Webster
Legislative Director
Rep. Dean Phillips
Trey.Webster@mail.house.gov

Tim Weiler
Economic Policy Adviser
Rep. Bill Foster
tim.weiler@mail.house.gov

Will Pisano
Legislative Director
Rep. Annie Kuster
will.pisano@mail.house.gov

Donald Pollard
Legislative Director
Rep. Jennifer McClellan
donald.pollard@mail.house.gov

Leah Li
Senior Legislative Assistant
Rep. Derek Kilmer
leah.li@mail.house.gov

Annika Nozaki
Staff Assistant
Rep. Ed Case
Annika.Nozaki@mail.house.gov

Noelle Britton
Deputy Chief of Staff
Rep. Lloyd Smucker
noelle.britton@mail.house.gov

Phil McLaughlin
Policy Adviser
New Democrat Coalition
phil.mclaughlin@mail.house.gov

Kelsey Wolfgram
Deputy Chief of Staff
Rep. Tim Burchett
Kelsey.Wolfgram@mail.house.gov

Kathryn Chakmak
Tax Policy Adviser
House Ways and Means (R)
Kathryn.Chakmak@mail.house.gov