

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: Jefferson Willis
2. a. Name of Accompanying Relative: _____ **OR** None
b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates: Departure: April 12, 2024 Return: April 14, 2024
b. Dates at Personal Expense, if any: _____ **OR** None
4. Departure City: Washington, DC Destination: Hot Springs, VA Return City: Washington, DC
5. Sponsor(s), Who Paid for the Trip: EPIC
6. Describe Meetings and Events Attended: Learning more about the US fiscal health and upcoming tax cliff in 2025
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:  Date: May 8, 2024

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. Kevin Hern Date: May 8, 2024

Signature of Supervising Member: 

COMMITTEE ON ETHICS

SPONSOR POST-TRAVEL DISCLOSURE FORM

Original Amendment

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

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

1. Sponsor(s) who paid or provided in-kind support for the trip: The Economic Policy Innovation Center (EPIC)

2. Travel Destination(s): Hot Springs, VA

3. Date of Departure: Friday, April 12, 2024 Date of Return: Sunday, April 14, 2024

4. Name(s) of Traveler(s): Jefferson Willis

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	\$0	\$214	\$147.50	\$1,880.21 (Conference fee, space rental, signage, AV, educational materials, florals, photographer, welcome and informational package, taxes & service fees)
Accompanying Family Member	N/A	N/A	N/A	N/A

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: Zoe Jackman Digitally signed by Zoe Jackman
Date: 2024.04.23 19:12:32 -04'00' Date: April 23, 2024

Name: Zoe Jackman Title: Chief of Staff

Organization: Economic Policy Innovation Center

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

Address: 430 1st St. SE, Ste. 2, Washington, DC 20003

Telephone: 202-460-0014 Email: zoe.jackman@epicforamerica.org

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

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

COMMITTEE ON ETHICS

TRAVELER FORM

1. Name of Traveler: Jefferson Willis
2. Sponsor(s) who will be paying or providing in-kind support for the trip: The Economic Policy Innovation Center (EPIC)
3. City and State **OR** Foreign Country of Travel: Hot Springs, VA
4. a. Date of Departure: Friday, April 12, 2024 Date of Return: Sunday, April 14, 2024
b. Yes No Will you be extending the trip at your personal expense?
If yes, list dates at personal expense: _____
5. a. Yes No Will you be accompanied by a family member at the sponsor's expense? If yes:
 - (1) Name of Accompanying Family Member: _____
 - (2) Relationship to Traveler: Spouse Child Other (specify): _____
 - (3) Yes No Accompanying Family Member is at least 18 years of age?
6. a. Yes No Did the trip sponsor answer "Yes" to Question 8(c) on the *Primary Trip Sponsor Form* (i.e., travel is sponsored by an entity that employs a registered federal lobbyist or a foreign agent)?
b. If yes, and you are requesting lodging for two nights, explain why the second night is warranted:

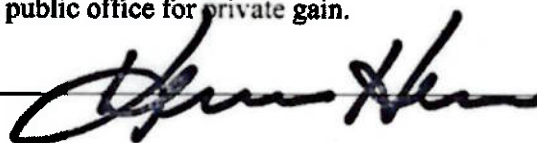
7. Yes No *Primary Trip Sponsor Form* is attached, including agenda, invitation, invitee list, and any other attachments and Additional Sponsor Forms.
NOTE: The agenda should show the traveler's individual schedule, including departure and arrival times and identify the specific events in which the traveler will be participating.
8. Explain why participation in the trip is connected to the traveler's individual official or representational duties. **Staff should include their job title and how the activities on the itinerary relate to their duties.**
I am Kevin Hern's Legislative Director and leader of his policy team. The policy discussions on the trip agenda are important to carrying out my duties.

9. Yes No **Is the traveler aware of any registered federal lobbyists or foreign agents involved in planning, organizing, requesting, or arranging the trip?**
10. For staff travelers, to be completed by your employing Member:

ADVANCED AUTHORIZATION OF EMPLOYEE TRAVEL

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

Signature of Employing Member: _____



Date: 3/19/24

COMMITTEE ON ETHICS

PRIMARY TRIP SPONSOR FORM

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

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

1. Sponsor who will be paying for the trip:

The Economic Policy Innovation Center (EPIC)

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

3. **Check only one.** I represent that:

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

If "c" is checked, list the names of the additional sponsors: _____

4. Provide names and titles of **ALL** House Members *and* employees you are inviting. **For each House invitee, provide an explanation of why the individual was invited** (include additional pages if necessary): The Members of Congress who were invited have all demonstrated a commitment to developing strong conservative policies that will benefit the American economy. Please see attached for full list of invitees.

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

6. Date of Departure: Friday, April 12, 2024 Date of Return: Sunday, April 14, 2024

7. a. City of departure: Washington, DC

b. Destination(s): Hot Springs, VA

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.

17. I represent that all expenses connected to the trip will be for actual costs incurred and not a per diem or lump sum payment. *Signify that the statement is true by checking the box.*

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

<input type="checkbox"/> Actual Amounts <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	\$100	\$214	\$147.50
For each Accompanying Family Member	\$100	\$0	\$147.50

	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	\$250	Conference Attendance Fee
For each Accompanying Family Member	\$250	Conference Attendance Fee

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: Zoe Jackman Digitally signed by Zoe Jackman
Date: 2024.04.04 10:57:38 -04'00' Date: March 8, 2024

Name: Zoe Jackman Title: Chief of Staff

Organization: Economic Policy Innovation Center

Address: 430 1st St. SE, Ste. 2, Washington, DC 20003

Email: zoe.jackman@epicforamerica.org Telephone: 202-460-0014

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

Michael Guest, Mississippi
Chairman
Susan Wild, Pennsylvania
Ranking Member

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

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



ONE HUNDRED EIGHTEENTH CONGRESS

U.S. House of Representatives

COMMITTEE ON ETHICS

Thomas A. Rust
Staff Director and Chief Counsel

Keelie Broom
Counsel to the Chairman

David Arrojo
Counsel to the Ranking Member

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

April 8, 2024

Mr. Jefferson Willis
Office of the Honorable Kevin Hern
1019 Longworth House Office Building
Washington, DC 20515

Dear Mr. Willis:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Hot Springs, Virginia, scheduled for April 12 to 14, 2024, sponsored by Economic Policy Innovation Center.

Committee travel regulations require that you submit your complete pre-trip approval request to the Committee at least 30 days before the commencement of the trip or it will not be granted. Despite your failure to do so in this instance, we are approving your current request. However, any future requests must adhere to the 30-day requirement or they will be denied.

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.



SCHEDULE OF EVENTS (Actual)

Friday, April 12, 2024

- 10:00 am** **All luggage must be loaded onto the bus**
Location: Rayburn Horseshoe
- Immediately Post-Votes** **Bus Loads on Capitol Hill for Member & Staff Transportation to The
Omni Homestead Resort**
Location: Rayburn Horseshoe
Attendees arrive and load onto bus
- 1:40 pm** **Bus Departs**
- 1:30 pm – 5:40 pm** **Travel from Capitol Hill to The Omni Homestead Resort**
*Attendees driving separately to The Omni Homestead and arriving before
4:00 pm or after 5:00 pm should call Zoe Jackman at (202) 460-0014
upon arrival, as check-in for the event will not take place through the
regular hotel concierge desk.*
- 5:40 pm – 6:00 pm** **Arrival & Check-In at The Omni Homestead Resort**
Location: Jefferson Parlor
POC: Zoe Jackman, EPIC Staff, (202) 460-0014
*Bus arrives; Attendees proceed through main lobby to Jefferson Parlor for
check-in*
- 6:00 pm – 6:15 pm** **Break**
- 6:15 pm – 7:00 pm** **Welcome Reception**
Location: Grand Ballroom Foyer
Opening Remarks: Paul Winfree, President & CEO of EPIC
- 7:00 pm – 8:30 pm** **Welcome Dinner**
Location: Grand Ballroom East
Keynote Speaker: Neil Howe, Author of "The Fourth Turning Is Here:
What the Seasons of History Tell Us About How and When This Crisis Will
End," in conversation with Paul Winfree, President & CEO of EPIC
- End of Day 1 / RON**

3:15 pm - 3:20 pm

Wrap-Up Commentary

Location: Grand Ballroom West

3:20 pm - 6:00 pm

Executive Time

6:00 pm - 8:30 pm

Dinner and Dessert Reception: Vignettes of Economic Success

Location: Grand Ballroom East & Grand Ballroom Foyer

Speaker: Paul Winfree, President & CEO of EPIC in conversation with Joe Grogan, Nonresident Fellow at the USC Schaeffer Center and former Assistant to the President for Domestic Policy for Donald J. Trump, Paul Teller, Executive Director of Advancing American Freedom, and Stephen Moore, Distinguished Fellow in Economics at The Heritage Foundation

End of Day 2 / RON

Sunday, April 14, 2024

7:30 am - 8:00 am

Breakfast Buffet Opens

Location: Grand Ballroom West

Attendees to use this time to discuss prior day's sessions and establish new policy goals

8:00 am - 9:00 am

Breakfast Panel: Dismantling the Woke Agenda

Location: Grand Ballroom West

Moderator: Paul Winfree, President & CEO of EPIC

Panelists: Jay Richards, Director of the DeVos Center for Life, Religion, and Family and the William E. Simon Senior Research Fellow at The Heritage Foundation and James Sherk, Director of the Center for American Freedom at the America First Policy Institute

9:00 am - 10:00 am

Panel Discussion: Promoting Opportunity

Location: Grand Ballroom West

Moderator: Bill Beach, Senior Fellow in Economics at EPIC

Panelists: Rachel Greszler, Visiting Fellow in Workforce at EPIC and Tarren Bragdon, CEO of The Foundation for Government Accountability

10:00 am - 10:30 am

Break

Note: Attendees should use this opportunity to checkout of the hotel as needed; luggage storage will be provided

10:30 am - 12:00 pm

Wrap-Up Session*

Location: Grand Ballroom West

*Congressional-Only Activity: Discussion moderated by Paul Winfree, President & CEO of EPIC



**ECONOMIC POLICY
INNOVATION CENTER**

Conservative Members Retreat 2024
April 12-14, 2024
Hosted by the Economic Policy Innovation Center (EPIC)
The Omni Homestead Resort: Hot Springs, VA

CONGRESSIONAL ATTENDEE LIST (*Final*)

Title	Member First Name	Member Last Name	Member District
Rep.	Robert	Aderholt	AL-04
Rep.	Mark	Alford	MO-04
Rep.	Aaron	Bean	FL-04
Rep.	Cliff	Bentz	OR-02
Rep.	Ben	Cline	VA-06
Rep.	Mike	Collins	GA-10
Rep.	Chuck	Edwards	NC-11
Rep.	Ron	Estes	KS-04
Rep.	Bob	Good	VA-05
Rep.	Garret	Graves	LA-06
Rep.	Harriet	Hageman	WY-AL
Rep.	Kevin	Hern	OK-01
Rep.	Tom	McClintock	CA-05
Rep.	Rich	McCormick	GA-06
Rep.	August	Pfluger	TX-11
Rep.	John	Rose	TN-06
Rep.	Keith	Self	TX-03
Rep.	Beth	Van Duyne	TX-24
Rep.	Joe	Wilson	SC-02

Title	Staff First Name	Staff Last Name	Office
Mr.	Joe	Barry	Republican Study Committee
Ms.	Marisa	Burleson	Republican Study Committee
Mr.	Kyle	Campbell	Republican Study Committee
Ms.	Miranda	Dabney	Republican Study Committee
Mr.	Cameron	Foster	Rep. Kevin Hern
Mr.	Chris	Giblin	Republican Study Committee
Mr.	Omar	Hossino	Republican Study Committee
Mr.	Zack	Lissau	Rep. Kevin Hern
Ms.	Meg	Maykoski	Rep. Kevin Hern
Mr.	Martin	Menezes	Republican Study Committee
Ms.	Abby	McHan	Republican Study Committee
Mr.	Kevin	Pham	Republican Study Committee
Mr.	Mike	Robertson	Republican Study Committee
Ms.	Kirby	Tidmore	Rep. Kevin Hern
Ms.	Emma	White	Republican Study Committee
Mr.	Jefferson	Willis	Rep. Kevin Hern

Title	Member First Name	Member Last Name	Member District
Rep.	Kat	Cammack	FL-03
Rep.	Mike	Carey	OH-01
Rep.	Jerry	Carl	AL-01
Rep.	Buddy	Carter	GA-01
Rep.	John	Carter	TX-31
Rep.	Juan	Ciscomani	AZ-06
Rep.	Ben	Cline	VA-06
Rep.	Michael	Cloud	TX-27
Rep.	Andrew	Clyde	GA-09
Rep.	Tom	Cole	OK-04
Rep.	Mike	Collins	GA-10
Rep.	James	Comer	KY-01
Rep.	Dan	Crenshaw	TX-02
Rep.	John	Curtis	UT-03
Rep.	Warren	Davidson	OH-08
Rep.	Monica	De La Cruz	TX-15
Rep.	Scott	DesJarlais	TN-04
Rep.	Byron	Donalds	FL-19
Rep.	Jeff	Duncan	SC-03
Rep.	Neal	Dunn	FL-02
Rep.	Chuck	Edwards	NC-11
Rep.	Jake	Ellzey	TX-06
Rep.	Tom	Emmer	MN-06
Rep.	Ron	Estes	KS-04
Rep.	Mike	Ezell	MS-04
Rep.	Pat	Fallon	TX-04
Rep.	Randy	Feenstra	IA-04
Rep.	Drew	Ferguson	GA-03
Rep.	Brad	Finstad	MN-01
Rep.	Michelle	Fischbach	MN-7
Rep.	Scott	Fitzgerald	WI-05
Rep.	Chuck	Fleischmann	TN-03
Rep.	Mike	Flood	NE-01
Rep.	Virginia	Foxx	NC-05
Rep.	Scott	Franklin	FL-18
Rep.	Russell	Fry	SC-07
Rep.	Russ	Fulcher	ID-01

Title	Member First Name	Member Last Name	Member District
Rep.	Jake	LaTurner	KS-02
Rep.	Laurel	Lee	FL-15
Rep.	Debbie	Lesko	AZ-08
Rep.	Julia	Letlow	LA-05
Rep.	Barry	Loudermilk	GA-11
Rep.	Blaine	Luetkemeyer	MO-03
Rep.	Morgan	Luttrell	TX-08
Rep.	Nicole	Malliotakis	NY-11
Rep.	Tracey	Mann	KS-01
Rep.	Brian	Mast	FL-21
Rep.	Michael	McCaul	TX-10
Rep.	Lisa	McClain	MI-09
Rep.	Tom	McClintock	CA-05
Rep.	Rich	McCormick	GA-06
Rep.	Patrick	McHenry	NC-10
Rep.	Cathy	McMorris Rodgers	WA-05
Rep.	Dan	Meuser	PA-09
Rep.	Mary	Miller	IL-15
Rep.	Max	Miller	OH-07
Rep.	Cory	Mills	FL-07
Rep.	John	Moolenaar	MI-02
Rep.	Alex	Mooney	WV-02
Rep.	Barry	Moore	AL-02
Rep.	Blake	Moore	UT-01
Rep.	Nathaniel	Moran	TX-01
Rep.	James	Moylan	Guam
Rep.	Greg	Murphy	NC-03
Rep.	Troy	Nehls	TX-22
Rep.	Dan	Newhouse	WA-04
Rep.	Ralph	Norman	SC-05
Rep.	Zach	Nunn	IA-03
Rep.	Jay	Oberholte	CA-23
Rep.	Andy	Ogles	TN-05
Rep.	Burgess	Owens	UT-04
Rep.	Gary	Palmer	AL-06
Rep.	Anna	Paulina Luna	FL-13
Rep.	Greg	Pence	IN-06

Title	Member First Name	Member Last Name	Member District
Rep.	Brandon	Williams	NY-22
Rep.	Roger	Williams	TX-25
Rep.	Joe	Wilson	SC-02
Rep.	Robert	Wittman	VA-01
Rep.	Rudy	Yakym	IN-02
Rep.	Ryan	Zinke	MT-01

Title	Staff First Name	Staff Last Name	Office
Mr.	Joe	Barry	Republican Study Committee
Ms.	Marisa	Burleson	Republican Study Committee
Mr.	Kyle	Campbell	Republican Study Committee
Ms.	Miranda	Dabney	Republican Study Committee
Mr.	Cameron	Foster	Rep. Kevin Hern
Mr.	Chris	Giblin	Republican Study Committee
Mr.	Omar	Hossino	Republican Study Committee
Mr.	Zack	Lissau	Rep. Kevin Hern
Ms.	Meg	Maykoski	Rep. Kevin Hern
Mr.	Martin	Menezes	Republican Study Committee
Ms.	Abby	McHan	Republican Study Committee
Mr.	Kevin	Pham	Republican Study Committee
Mr.	Mike	Robertson	Republican Study Committee
Ms.	Kirby	Tidmore	Rep. Kevin Hern
Ms.	Emma	White	Republican Study Committee
Mr.	Jefferson	Willis	Rep. Kevin Hern

Keynote Speaker: Neil Howe, Author of *The Fourth Turning Is Here: What the Seasons of History Tell Us About How and When This Crisis Will End with Fireside Chat Interview with Paul Winfree*

- **Overview:** Neil Howe is a respected author who has done powerful research about generational differences. The book he will be discussing explores cycles of history, and how today's generational differences will impact the "fourth turning" cycle of turmoil and upheaval. He will deliver opening remarks before sitting down for a fireside chat with Paul Winfree.
- **Attendee Objectives:** Given recent societal challenges, including upheaval during the COVID-19 pandemic and perceptions of culture wars, this session will serve to give attendees more insight into the historical cycles that led to these periods of unrest. More importantly, the discussion with Neil and Paul will focus on how actions can be taken to bridge generational divides and enable communities to meet and overcome these challenges.

RON

Saturday, April 13, 2024

7:30 am – 8:00 am

Breakfast Buffet Opens

Location: Grand Ballroom West

Attendees to use this time to discuss prior day's sessions and establish new policy working relationships

8:00 am – 9:00 am

Breakfast Session: Tax Reform Look-Ahead

Location: Grand Ballroom West

Fireside Chat: *Shahira Knight, Deputy Managing Principal for Policy & Government Relations at Deloitte LLP and Kevin Brady, Former Chairman of the House Ways and Means Committee*

- **Overview:** In this session, Shahira will give opening remarks that center around how the 2017 Tax Cuts & Jobs Act (TCJA) came to fruition, and explore the provisions of the bill that passed while she served in the White House. She will then sit down with Kevin for a fireside chat, where the two will discuss the differences between the legislative and executive branch when it came to the TCJA negotiations. They will also review some of the provisions that did not ultimately make it into the TCJA, and what they could have done differently. There will be time for audience Q&A.
- **Attendee Objectives:** This session will provide attendees with a robust understanding of the TCJA, which is set to expire in 2025, and which serves as a major fiscal inflection point. The panelists will highlight for attendees how negotiations proceeded, enabling them to begin negotiations on future tax reform discussions from a stronger position. It will also provide attendees with information about tax reform provisions that could be prioritized for inclusion in future tax reform discussions.

9:00 am – 9:30 am

Break

9:30 am – 10:15 am

Morning Keynote Address

Location: Grand Ballroom East

Speaker: *Gov. Glenn Youngkin (VA)*

- **Attendee Objectives:** The attendees will learn from experts about the devastating impacts the fiscal cliff could have on the economy if the major imbalances are not addressed and dealt with. Attendees will get insights into practical policy solutions that could help stave off the fiscal cliff, or at least mitigate the impacts. Attendees will also have the opportunity to ask questions of the experts on the panel.

2:15 pm – 3:15 pm

Panel Discussion: Deregulating the Economy

Location: Grand Ballroom West

Moderator: Joe Grogan, Nonresident Senior Fellow at the USC Leonard D. Schaeffer Center for Health Policy & Economics

Panelists: Brian Blase, President of Paragon Health Institute and DJ Gribbin, Founder of Madrus

- **Overview:** The session will look at the detrimental impacts of overregulation, as well as the productive boost to the economy from smart deregulation. Joe, Brian, and DJ will examine how regulation has had an effect on a variety of different industries, including healthcare and infrastructure. Joe will also frame the conversation based on his experiences serving in the Administration.
- **Attendee Objectives:** Attendees will learn how damaging overregulation can be on sectors of the economy, including some of the sectors that are key drivers of the American economy. Panelists will share their expertise in both framing the conversation and on specific ways Congress can use their powers to enable deregulation and changes to rules. Attendees will have a chance to engage with the panel experts through Q&A.

3:15 pm – 3:30 pm

Break

3:30 pm – 6:00 pm

Executive Time

6:00 pm – 8:30 pm

Dinner and Dessert Reception: Vignettes of Economic Success

Location: Grand Ballroom East & Grand Ballroom Foyer

Speaker: Paul Winfree, President & CEO of EPIC and Guests

- **Overview:** Paul will give a keynote speech detailing his experiences serving in the White House, specifically expounding on the development of sound economic policy. Paul will then invite select other panelists to share their own experiences in shaping economic policy, their lessons learned, and secrets to successful strategic implementation at the highest levels of government. The other panelists joining Paul are all those who are currently serving on other panels throughout the weekend and who have served in a senior position in the Executive Branch.
- **Attendee Objectives:** The attendees will get behind-the-scenes, topical insights into the ins and outs of economic policymaking within the federal government. Paul and the other commentators will offer attendees their perspectives on working with Congress while in the Executive Branch, and how these inter-governmental relationships can best be developed and strengthened.

RON

Attendees will have the opportunity to ask the panelists questions during the Q&A portion of this session.

10:00 am – 10:30 am

Break

Note: Attendees should use this opportunity to checkout of the hotel as needed

10:30 am – 12:00 pm

Wrap-Up Session

Location: Grand Ballroom West

Moderator: Paul Winfree, President & CEO of EPIC

- **Overview:** Paul Winfree will lead a recap of the weekend's sessions, drawing out key topical lessons learned and reviewing the discussed measures to address the upcoming fiscal inflection points.
- **Attendee Objectives:** Attendees, along with EPIC staff, will weigh in on how to best utilize the strategies and information learned over the weekend to positively impact approaches to policymaking over the next 12-24 months. EPIC staff and other speakers will be on hand to answer questions as part of a group wrap-up session.

12:00 pm – 1:00 pm

Closing Luncheon: A Pro-Family Economic Agenda

Location: Grand Ballroom West

Moderator: Brittany Madni, Executive Vice President at EPIC

Panelists: Brad Wilcox, Professor of Sociology at The University of Virginia, Rachel Greszler, Visiting Fellow in Workforce at EPIC, and Tim Carney, Senior Fellow at The American Enterprise Institute

- **Overview:** Brittany, Brad, Rachel, and Tim will focus the session on the impact of family structure on the economy. They will discuss the benefits and pitfalls of parenting in today's culture, as well as how marriage can benefit men and women economically.
- **Attendee Objectives:** The attendees will learn from both hard data and sociological approaches about the benefits of putting family first – for societal gain and for economic growth potential. The attendees will have the opportunity to ask the experts questions during the Q&A portion of the event.

1:30 pm – 2:00 pm

End of Conference; Attendee Departure

Bus departs from The Omni Homestead Resort back to Capitol Hill

2:00 pm – 6:00 pm

Travel from The Omni Homestead Resort to Capitol Hill

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End of Conference