

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: Benjamin Frohman
2. a. Name of Accompanying Relative: _____ **OR** None
b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates: Departure: 12/6/2024 Return: 12/7/2024
b. Dates at Personal Expense, if any: _____ **OR** None
4. Departure City: Washington DC Destination: Williamsburg, VA Return City: Washington DC
5. Sponsor(s), Who Paid for the Trip: Gates Global Policy
6. Describe Meetings and Events Attended: _____
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: *Benjamin Frohman* Date: 12/12/2024

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: Raja Krishnamoorthi Date: 12/12/2024

Signature of Supervising Member: *Raja Krishnamoorthi*

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: Robert M. Gates Global Policy Center

2. Travel Destination(s): Williamsburg, Virginia

3. Date of Departure: 12/6/2024 Date of Return: 12/7/2024

4. Name(s) of Traveler(s): Benjamin Frohman

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	315 Miles (\$211.05)	\$300.00	\$160.00	Rental Car (\$51.49)
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: 12/18/24

Name: KATHRYN A. CONDON Title: GGPC, CFO

Organization: ROBERT M. GATES GLOBAL POLICY CENTER

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

Address: PO BOX 1257, NEWINGTON, VA 22122

Telephone: 703-505-8339 Email: kathy@gatesglobalpolicy.org

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

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

COMMITTEE ON ETHICS

TRAVELER FORM

This form should be completed by House Members, officers, or employees seeking Committee approval of privately-sponsored travel or reimbursement for travel under House Rule 25, clause 5. The completed form should be submitted directly to the Committee by each invited House Member, officer, or employee, together with the completed and signed trip sponsor form(s) and any attachments. A copy of this form, minus this initial page, will be made available for public inspection.

This form and any attachments may be submitted at 1015 Longworth House Office Building or travel.requests@mail.house.gov.

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: Benjamin B. Frohman

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: Benjamin Frohman

Name of Signatory (if other than traveler): Bengal

For Staff (name of employing Member or Committee): Rep. Krishnamoorthi/China Select Committee

Office Address: O'Neill House Office Bldg, Rm. 3460

Telephone Number: 202-815-3766

Email Address of Contact Person: tristan.banks@mail.house.gov

Check this box if the sponsoring entity is a media outlet, the purpose of the trip is to make a media appearance sponsored by that entity, and these forms are being submitted to the Committee less than 30 days before the trip departure date.

NOTE: You must complete all of the contact information fields above, as Committee staff may need to contact you if additional information is required.

KEEP A COPY OF THIS FORM. Page 2 (but not this page) must be submitted to the Clerk as part of the post-travel disclosure required by House Rule 25. Travel Regulation § 404(d) also requires you to keep a copy of all request forms and supporting paperwork for three subsequent Congresses from the date of travel.

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

COMMITTEE ON ETHICS

TRAVELER FORM

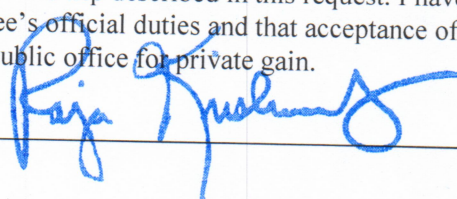
1. Name of Traveler: Benjamin B. Frohman
2. Sponsor(s) who will be paying or providing in-kind support for the trip: Gates Foundation
3. City and State **OR** Foreign Country of Travel: Williamsburg, VA
4. a. Date of Departure: 12/6/2024 Date of Return: 12/7/2024
b. Yes No Will you be extending the trip 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 National Security Advisor to Rep. Krishnamoorthi in his capacity as Ranking Member of the House Select Committee on Strategic Competition with the CCP and will be assisting him with the subject matter related to the conference.
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: 11/26/24

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:

Robert M. Gates Global Policy Center

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): _____
See attached paper.

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

6. Date of Departure: Friday, December 6th Date of Return: Saturday, December 8th

7. a. City of departure: Washington, DC

b. Destination(s): Williamsburg, VA

c. City of return: Chicago, Illinois

8. **Check only one.** I represent that

- a. The sponsor of the trip is an institution of higher education within the meaning of section 101 of the Higher Education Act of 1965; **OR**
b. The sponsor of the trip does not retain or employ a registered federal lobbyist or foreign agent; **OR**
c. The sponsor employs or retains a registered federal lobbyist or foreign agent, but the trip is for attendance at a one-day event *and* lobbyist / foreign agent involvement in planning, organizing, requesting, or arranging the trip was *de minimis* under the Committee's travel regulations.

9. **Check only one of the following.**

- a. I checked 8(a) or (b) above; **OR**
b. I checked 8(c) above but am not offering any lodging; **OR**
c. I checked 8(c) above and am offering lodging and meals for one night; **OR**
d. I checked 8(c) above and am offering lodging and meals for two nights. If you checked this box, explain why the second night of lodging is warranted. _____

10. Attached is a detailed agenda of the activities House invitees will be participating in during the travel (i.e., an hourly description of planned activities for trip invitees). *Indicate agenda is attached by checking box.*

11. **Check only one of the following.**

- a. I represent that a registered federal lobbyist or foreign agent will not accompany House Members or employees on any segment of the trip. *Signify the statement is true by clicking the box; OR*
b. *Not Applicable.* Trip sponsor is a U.S. institution of higher education.

12. For *each* sponsor required to submit a sponsor form, describe the sponsor's interest in the subject matter of the trip *and* its role in organizing and/or conducting the trip:

See attached paper

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: Williamsburg Lodge City: Williamsburg Cost Per Night: \$300.00
Reason(s) for Selecting: Proximity to William&Mary (location of conference)
Hotel Name: _____ City: _____ Cost Per Night: _____
Reason(s) for Selecting: _____
Hotel Name: _____ City: _____ Cost Per Night: _____
Reason(s) for Selecting: _____

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

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

<input type="checkbox"/> Actual Amounts <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	\$189 Car/\$350 Flight	\$300.00	\$160.00
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	\$10.00	Parking
For each Accompanying Family Member		

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: 11/8/24
Name: Kathryn A. Condon Title: CFO
Organization: Robert M.Gates Global Policy Center
Address: PO Box 1257, Newington, Virginia 22122
Email: kathy@gatesglobalpolicy.org Telephone: (703) 505-8339

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

December 6, 2024

Mr. Benjamin Frohman
The Select Committee on the Chinese Communist Party
3460 O'Neill House Office Building
Washington, DC 20515

Dear Mr. Frohman:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Williamsburg, Virginia, scheduled for December 6 to 7, 2024, sponsored by Gates Global Policy 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.

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

Sincerely,



Michael Guest
Chairman



Susan Wild
Ranking Member

MG/SW:mc

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

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

Sincerely,



Michael Guest
Chairman



Susan Wild
Ranking Member

MG/SW:mc

#4: Representative Raja Krishnamoorthi will attend the Forum. He will be accompanied by staff member Benjamin Frohman, his National Security Advisor. Representative Raja Krishnamoorthi was personally selected by Secretary Robert M. Gates based on his background related to the Gates Forum topic – U.S. sanctions policies and approach to economic statecraft. All conferees were allowed to have an expert plus-one accompany them to the forum. Benjamin Frohman will be attending with the Congressman because he advises Representative Raja Krishnamoorthi on national security/foreign affairs issues.

#12: The Gates Global Policy Center (GGPC) forum will address the need to rethink U.S. sanctions policy and approach to economic statecraft. Participants will discuss the topic and allow the GGPC to craft recommendations for action that will lead to broad support in the administration and bipartisan support in Congress.

Robert M. Gates

August 29, 2024

The Honorable Raja Krishnamoorthi
U.S. House of Representatives

Dear Congressman Krishnamoorthi,

In the hope of providing a catalyst to rethink U.S. sanctions policies and approach to economic statecraft, I am hosting an intimate, closed-door convening at William & Mary in Williamsburg, VA on December 6-7 and inviting around a dozen individuals to tackle this issue in-person. The bipartisan group will include legislators, current and former administration officials, and several private sector experts. I will serve as chair and would welcome your participation.

Sanctions have become a go-to tool for U.S. policymakers seeking to punish and alter the behavior of foreign states, non-state actors, and certain individuals. The United States has been labeled “the only sanctions superpower,” but I am concerned that it often employs economic power in an indiscriminate, *ad hoc*, and counterproductive manner. Indeed, there are now literally thousands of U.S. sanctions in place. Despite the intelligence-driven modernization of sanctions tools, experts note that U.S. sanctions are generally too convoluted, inflexible, difficult to reverse, and increasingly easy to circumvent. Perhaps most importantly, sanctions have been poorly coordinated with other instruments of U.S. national power and often are not tied to attainable policy objectives.

This gathering is the third of our annual “Gates Forums.” In December 2022, we hosted a Forum on strategic communications and public diplomacy, and last year one on development assistance. I attach below the URL/links that will take you to our final reports on those two prior Forums, which I hope you will find of interest:

Strategic Communications: (Note – scroll down the page to access the full report)

<https://www.gatesglobalpolicy.org/reports-gfl-strategic-communications-public-diplomacy>

Development Assistance: (Note – scroll down the page to access the full report)

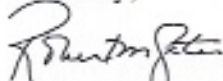
<https://www.gatesglobalpolicy.org/ggpc-reinvigorating-the-american-development-toolkit>

The objective of each Gates Forum is to come up with specific policy options – structural, programmatic, and budgetary – that offer the Executive Branch and Congress a road map with bipartisan support to significantly improve our capabilities and effectiveness. Our discussions are informed by original research produced by leading experts on the subject from around the country. To support our effort on sanctions and economic diplomacy this year, I have commissioned a series of original research papers on past U.S. success and failures, coordination with our allies and the private sector, integration with other levers of U.S. power, the role of the global south, the development of financial technologies, and the challenges posed by China’s rise.

To confirm your participation or for additional information, please contact General Peter Chiarelli (Retired), President of the Gates Global Policy Center, at Pete@GatesGlobalPolicy.org.

Thank you for your consideration. I hope I am able to host you at William & Mary this December.

Sincerely,



Robert M. Gates

Gates Forum III Economic Statecraft –Sanctions

Thursday, December 5

6:00-6:30 PM Shuttle from the Williamsburg Lodge to the Williamsburg Inn for dinner

6:30-7:30 PM Cocktail reception, East Lounge, Williamsburg Inn

7:30-9:00 PM Icebreaker dinner, East Lounge, Williamsburg Inn

9:00-9:30 PM Shuttle from the Williamsburg Inn to the Williamsburg Lodge

Friday, December 6

8:00-8:30 AM Shuttle from the Williamsburg Lodge to Alumni House

8:00-9:00 AM Breakfast at Alumni House

9:00-9:20 AM Welcome and introductions

President Rowe – Opening remarks

Chancellor Gates – Welcome

Introductions

Gen. (ret.) Pete Chiarelli - Administrative announcements *(The rules of engagement for the forum will be presented. All conferees will listen to the in-depth research presentations prior to discussions in the afternoon.)*

9:20-10:20 AM Discussion of Papers 1 + 2: The Sources of American Financial Power

Paper #1: **“The Sources of American Financial Power and its Challengers,”** by Dr. Daniel McDowell, Maxwell Advisory Board Professor of International Affairs, Maxwell School of Citizenship and Public Affairs, Syracuse University

Paper #2: **“Sanctions and the American Symphony of Power,”** by Dr. Daniel Drezner, Distinguished Professor of International Politics, Fletcher School of Diplomacy, Tufts University

Chancellor Gates leads discussion of topics raised by Papers 1+2

10:20-10:30 AM: BREAK

10:30-12 PM Discussion of Papers 3, 4, and 5: Building an Open Economic Order

Paper #3: **"A New World Re-Order: Geopolitical Shifts Arising from Tomorrow's Financial Systems"** by Yaya Fanusie, Director of Policy for AML & Cyber Risk, Crypto Council; Adjunct Fellow, Center for a New American Security

Paper #4: **"Weaponized Interdependence and the Global South,"** by Samantha Custer, Director of Policy Analysis, AidData

Paper #5: **"China's Economic Statecraft and Implications for the Open Economic Order,"** by Dr. Audrye Wong, Assistant Professor of Political Science and International Relations, University of Southern California; Jeane Kirkpatrick Fellow, American Enterprise Institute

Chancellor Gates leads discussion of topics raised by Papers 3, 4, and 5

12:00-1:00 PM: LUNCH

1:00-2:00 PM: The Need for Coordination

Paper #6: **"Harnessing the Private Sector to Empower U.S. Economic Statecraft,"** by Dr. Will Norris, Associate Professor of International Affairs, The Bush School of Government and Public Service, Texas A&M

Paper #7: **"Toward a New Sanctions Multilateralism: How the United States Can Work Better with Allies on Economic Statecraft,"** by Edward Fishman, Senior Research Scholar, Center on Global Energy Policy, Columbia University

Chancellor Gates leads discussion of topics raised by Papers 6 + 7

2:00 to 3:00 PM: Framing the Problem and Identifying Solutions Pt. I *(After the paper presentations all conferees will discuss the presentations and provide their professional expertise to the presented research.)*

Discussion led by Eric Brown, Senior Research Scientist, W&M Global Research Institute; and Dr. Ryan A. Musto, Director of Forums and Research Initiatives, W&M Global Research Institute

3:00-3:15 PM: Break

3:15-4:15 PM: Framing the Problem and Identifying Solutions Pt. II *(After the first framing the problem session, the final afternoon session will continue to discuss potential solutions.)*

Discussion led by Eric Brown and Ryan A. Musto

4:15-4:30 PM: Day 1 Closing Remarks by Chancellor Gates

4:30-5:00 PM from the Alumni House to the Williamsburg Lodge

5:00-6:00 PM Executive Time

6:00-6:30 PM Shuttle from the Williamsburg Lodge to the Wren Building for dinner

6:00-7:00 PM Cocktails

7:00-8:30 PM President's Welcome Dinner *(The Secretary will have the opportunity in an informal session to recap the events of the day and prepare for the following day where the GGPC will listen to the conferee input and make potential options and recommendations.)*

8:30-9:00 PM Shuttle from the Wren Building to the Williamsburg Lodge

Saturday, December 7

8:00-8:30 AM Shuttle from the Williamsburg Lodge to the Alumni House

8:00-9:00 AM Breakfast at Alumni House

9:00-10:45 AM: Identification of possible recommendations

Discussion led by Chancellor Gates *(The GGPC will listen to the conferee input and make potential options and recommendations. A GGPC report will be produced.)*

10:45-11 AM: Break

11:00-12:00 PM **implementation strategy** *(The last session will discuss how to implement the potential options)*

Discussion led by Chancellor Gates

12:00-12:30 PM Adjournment, boxed lunches to go

12:30-1:00 PM Shuttle from the Alumni House to the Williamsburg Lodge



Gates Forum III: Economic Statecraft – Sanctions

Welcome to Williamsburg! We're happy you are joining us at the third annual Gates Forum. This letter and the attached agenda include important information and forum contacts.

The cocktail hour and ice breaker dinner on Thursday, December 5 will start at 6:30 PM in the East Lounge of the Williamsburg Inn, located at 136 Francis St E, Williamsburg, VA 23185. This is located across the street from the Williamsburg Lodge. Guides will be stationed outside to assist with directions to the East Lounge for those who wish to walk. A shuttle will be available for your convenience.

Forum sessions will be conducted at the William & Mary Alumni House, located at 500 Richmond Road, Williamsburg, VA 23185. There is limited parking available outside of the Alumni House.

A shuttle service has been arranged for transportation. The shuttle schedule is as follows:

Thursday, December 5

6:00-6:30 PM from the Williamsburg Lodge to the Williamsburg Inn for dinner
9:00-9:30 PM from the Williamsburg Inn to the Williamsburg Lodge

Friday, December 6

8:00-8:30 AM from the Williamsburg Lodge to the Alumni House
4:30-5:00 PM from the Alumni House to the Williamsburg Lodge
6:00-6:30 PM from the Williamsburg Lodge to the Wren Building for dinner
8:30-9:00 PM from the Wren Building to the Williamsburg Lodge

Saturday, December 7

8:00-8:30 AM from the Williamsburg Lodge to the Alumni House
12:30-1:00 PM from the Alumni House to the Williamsburg Lodge

Breakfast and lunch will be served at the Alumni House. Please look for signs or ask a staff member for directions to breakfast and meeting locations. Dietary restrictions have been communicated to catering. If there is something additional you would like to request, please contact Nancy Shaw or Candice Vinson. We will do our best to accommodate individual requirements.

Should you have any questions or need additional information, please contact:

Nancy Shaw 206-914-8582 (Gates Global Policy Center)
Candice Vinson 912-996-4849 (William & Mary Global Research Institute)

Gates Forum III: Economic Statecraft - Sanctions

Thursday, December 5

6:00-6:30 PM Shuttle from the Williamsburg Lodge to the Williamsburg Inn for dinner

6:30-7:15 PM Cocktail reception, East Lounge, Williamsburg Inn

7:15-8:45 PM Icebreaker dinner, East Lounge, Williamsburg Inn

8:45-9:15 PM Shuttle from the Williamsburg Inn to the Williamsburg Lodge

Friday, December 6

8:00-8:30 AM Shuttle from the Williamsburg Lodge to Alumni House

8:00-9:00 AM Breakfast at Alumni House

9:00-9:20 AM Welcome and introductions

President Rowe - Opening remarks

Chancellor Gates - Welcome

Introductions

Gen. (ret.) Pete Chiarelli - Administrative announcements

9:20-10:20 AM Discussion of Papers 1 + 2: *The Sources of American Financial Power*

Paper #1: "The Sources of American Financial Power and its Challengers," by Dr. Daniel McDowell, Maxwell Advisory Board Professor of International Affairs, Maxwell School of Citizenship and Public Affairs, Syracuse University

Paper #2: "Sanctions and the American Symphony of Power," by Dr. Daniel Drezner, Distinguished Professor of International Politics, Fletcher School of Diplomacy, Tufts University

Chancellor Gates leads discussion of topics raised by Papers 1+2

10:20-10:30 AM Break

10:30-12:00 PM Discussion of Papers 3, 4, and 5: *Building an Open Economic Order*

Paper #3: "A New World Re-Order: Geopolitical Shifts Arising from Tomorrow's Financial Systems" by Yaya Fanusie, Director of Policy for AML & Cyber Risk, Crypto Council; Adjunct Fellow, Center for a New American Security

Paper #4: "Weaponized Interdependence and the Global South," by Samantha Custer, Director of Policy Analysis, AidData

Paper #5: "China's Economic Statecraft and Implications for the Open Economic Order," by Dr. Audrye Wong, Assistant Professor of Political Science and International Relations, University of Southern California; Jeane Kirkpatrick Fellow, American Enterprise Institute

Chancellor Gates leads discussion of topics raised by Papers 3, 4, and 5

12:00-1:00 PM Lunch

1:00-2:00 PM Discussion of Papers 6 + 7: *The Need for Coordination*

Paper #6: "Harnessing the Private Sector to Empower U.S. Economic Statecraft," by Dr. Will Norris, Associate Professor of International Affairs, The Bush School of Government and Public Service, Texas A&M

Paper #7: "A New Path for Multilateral Economic Statecraft: Retooling U.S.-Allied Coordination for the Age of Economic Warfare," by Edward Fishman, Senior Research Scholar, Center on Global Energy Policy, Columbia University

Chancellor Gates leads discussion of topics raised by Papers 6 + 7

2:00 to 3:00 PM *Framing the Problem and Identifying Solutions Pt. I*

Discussion led by Eric Brown, Senior Research Scientist, W&M Global Research Institute; and Dr. Ryan A. Musto, Director of Forums and Research Initiatives, W&M Global Research Institute

3:00-3:15 PM Break

3:15-4:15 PM *Framing the Problem and Identifying Solutions Pt. II*

Discussion led by Eric Brown and Ryan A. Musto

4:15-4:30 PM Day 1 Closing Remarks by Chancellor Gates

4:30-5:00 PM from the Alumni House to the Williamsburg Lodge

5:00-6:00 PM Executive Time

6:00-6:30 PM Shuttle from the Williamsburg Lodge to the Wren Building for dinner

6:00-7:00 PM Cocktails

7:00-8:30 PM President's Welcome Dinner

8:30-9:00 PM Shuttle from the Wren Building to the Williamsburg Lodge

Saturday, December 7

8:00-8:30 AM Shuttle from the Williamsburg Lodge to the Alumni House

8:00-9:00 AM Breakfast at Alumni House

9:00-10:45 AM Decisions on options/recommendations

Discussion led by Chancellor Gates

10:45-11 AM Break

11:00-12:00 PM Implementation strategy

Discussion led by Chancellor Gates

12:00-12:30 PM Adjournment, boxed lunches to go

12:30-1:00 PM Shuttle from the Alumni House to the Williamsburg Lodge

Attendee Materials

Gates Forum III

Sanctions and the Symphony
of Power: Revitalizing
American Economic Statecraft

Conferee Biographies



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Chancellor Robert M. Gates

Chancellor of William & Mary
Former Secretary of Defense

Robert Gates served as the 22nd secretary of defense (2006-2011). He is the only secretary of defense in U.S. history to be asked to remain in office by a newly elected president. Dr. Gates served eight U.S. presidents across both parties. On Gates's last day in office, President Barack Obama awarded him the Presidential Medal of Freedom, America's highest civilian honor.

Before becoming secretary of defense in 2006, Gates was the president of Texas A&M University, one of the nation's largest universities.

Gates served in the CIA for nearly 27 years, culminating his service as director of Central Intelligence from 1991 to 1993. He is the only career officer in CIA's history to rise from entry-level employee to director. He spent nearly nine years on the National Security Council at the White House, serving four administrations across both parties.

Gates has been awarded the National Security Medal, the Presidential Citizens Medal, has three times received the National Intelligence Distinguished Service Medal, and has three times received CIA's highest award, the Distinguished Intelligence Medal.

Gates currently is a principal at the consulting firm, Rice, Hadley, Gates & Manuel, LLC, with former Secretary of State Condoleezza Rice and former National Security Advisor Stephen Hadley. Additionally, he is Chancellor of William & Mary, his alma mater. He has served on various public boards, to include Starbucks, the NCAA, the American Council on Education, and the Boy Scouts of America. Gates has authored four books, covering his experiences at CIA and at the Pentagon, leadership, and US nonmilitary instruments of power.



Dr. Laurel Adams

National Intelligence Officer for Economic Issues
National Intelligence Council

Laurel has served as the NIO for Economic Issues since October 2021. Her career has been exceptionally varied and she draws on her deep expertise and broad experience from academia, professional services, industry, and government in this role. Since joining Treasury/OIA in October 2014, she has served as Senior Economist, Deputy Director for the Office of Economics and Finance, and most recently as Treasury/OIA's Chief Economist, and in these roles has covered a wide portfolio including licit and illicit economics and finance issues as well as US economic statecraft tools. Laurel started her public service career at the Department of State in 2010 and has worked internationally for elite professional services firms and in the telecommunications industry. Laurel is a faculty alumnus of Kellogg Graduate School of Management at Northwestern University and holds a Ph.D. in economics from the University of Pennsylvania.



Cyrus Amir-Mokri

General Counsel of the Commercial and Investment Bank
JP Morgan Chase & Co.

Cyrus Amir-Mokri is General Counsel of the Commercial and Investment Bank at JP Morgan Chase & Co., which comprises JP Morgan's global investment banking, corporate banking, markets, payments, and custody/fund servicing businesses. He oversees a team of approximately 750 legal professionals worldwide, two-thirds of whom are resident overseas. He advises senior management on issues of law, policy, risk, and strategy, and oversees coordination of transactional advice, regulatory matters and litigation.

From October, 2011 to April 2014, Cyrus served as the Assistant Secretary for Financial Institutions at the U.S. Department of the Treasury, where he was responsible for developing and coordinating financial institutions policy, which at the time was focused on implementation of the Dodd-Frank reforms, the European sovereign debt crisis, and global insurance regulatory matters. Cyrus was also responsible for overseeing development of Treasury's policy on cybersecurity – which included supervising Treasury's efforts to develop a framework for cybersecurity policy in collaboration with the Departments of Commerce and Homeland Security – and helping to coordinate the federal government's response to incidents in the financial sector. During his tenure at Treasury, Cyrus was also involved with terrorism finance, sanctions, and CFIUS matters. For his service at Treasury, the Secretary awarded Cyrus the Alexander Hamilton Award, the Department's highest honor. Before his service at Treasury, Cyrus was Senior Counsel to the chairman of the Commodities Futures Trading Commission (CFTC). While at the CFTC, Cyrus helped to lead the agency's engagement on the Dodd-Frank legislation and on the international response to the financial crisis.

Cyrus Amir-Mokri continued

Both before and after his government service, and immediately before joining JP Morgan, Cyrus was a partner in the New York office of the law firm of Skadden, Arps, Slate, Meagher & Flom LLP. In his law practice, he represented clients in litigation, international arbitration, antitrust, regulatory, and cyber security matters. All told, Cyrus spent more than a dozen years practicing law at Skadden. Earlier in his legal career, Cyrus served as a law clerk to the Honorable Bruce M. Selya of the United States Court of Appeals for the First Circuit. He is a graduate of the University of Chicago Law School, where he served as a fellow at the Center for the Study of Constitutionalism in Eastern Europe in the early 1990s.

Before his legal career, Cyrus studied history at the University of Chicago. His doctoral dissertation, titled "Redefining Iran's Constitutional Revolution," explored the interplay between nationalism and constitutionalism in twentieth century Iranian history. His dissertation was supported by a Mellon Foundation fellowship.

Cyrus is a graduate of Harvard College with an A.B. in biochemistry. He has served on a number of boards, and currently is a member of the Board of Governors of the Financial Industry Regulatory Authority (FINRA). He is a life member of the Council on Foreign Relations, where he has participated on several panels relating to international sanctions matters. He was included on the Carnegie Corporation's "Great Immigrants: The Pride of America" list in 2012 and is a recipient of the Ellis Island Medal of Honor. He lives in New York City with his wife, Katy, and twins, Arianna Darya and Cyrus Bijan.



Stephanie Baker

Senior Writer
Bloomberg

Stephanie Baker is the author of *Punishing Putin: Inside the Global Economic War to Bring Down Russia*, released by Scribner/Simon & Schuster in the US in September. She is a senior investigations writer at Bloomberg Businessweek based in London. She got her start as a reporter based in Russia in the 1990s. Her work has been recognized by the Gerald Loeb awards, the Overseas Press Club, the Society of Publishers in Asia (SOPA) and the UK Foreign Press Association, among others. She has appeared as a commentator on the BBC, MSNBC, CNBC, National Public Radio, PBS Newshour, and Sky News as well as her regular appearances on Bloomberg TV. She holds a masters in Comparative Politics from the London School of Economics focusing on Eastern Europe and Russia.



John P. Barker

Partner
Arnold & Porter

John P. Barker is a partner at the law firm Arnold & Porter. His practice focuses on national security matters including trade sanctions and export controls. He served as a Deputy Assistant Secretary of State for Nonproliferation Controls and, prior to that, as Deputy Assistant Secretary for Export Controls. He testified frequently before Congress on U.S. trade sanctions and export controls.

John received his J.D. from the University of Michigan Law School and an A.B. in Policy Studies from Dartmouth. After his clerkship with the Honorable James S. Holden of the U.S. District Court for the District of Vermont, he was appointed a Visiting Scholar at the Harvard Center for International Affairs. He also served as a Visiting Fellow at London's International Institute for Strategic Studies. Prior to joining the State Department he practiced law in the Silicon Valley, Tokyo and San Francisco.



Eric J. Beane

Deputy Under Secretary of Commerce Industry and Security

Eric J. Beane serves as the Deputy Under Secretary of Commerce for Industry and Security. As Deputy Under Secretary, Mr. Beane helps lead the Bureau of Industry and Security's mission to advance U.S. national security, foreign policy, and economic objectives by ensuring an effective export control and treaty compliance system and promoting U.S. strategic technology leadership. His responsibilities include oversight of the budget process, fiscal management, personnel management services, information technology and security, and various policy and programmatic priorities.

Mr. Beane brings extensive expertise and management experience to BIS. As a career attorney in the Federal Programs Branch of the U.S. Department of Justice from 2005 to 2011, he advised and defended federal agencies on economic sanctions programs. Following his federal service, Mr. Beane worked in a variety of state government leadership positions. He served as Deputy Legal Counsel and Deputy Chief of Staff to Governor Martin O'Malley in Maryland before moving to Rhode Island to serve in then-Governor Gina Raimondo's Administration. He served as Deputy Chief of Staff and Chief Operating Officer in the Governor's Office and then as Secretary of Health and Human Services. Immediately prior to joining BIS, Mr. Beane was Senior Vice President of Unite Us, a mission-driven technology startup focused on the social drivers of health and cross-sector collaboration.

Mr. Beane holds a Bachelor of Arts in public policy from the University of Chicago and a J.D. from the University of Arizona James E. Rogers College of Law. He also studied in London and Beijing.



Eric Brown

Senior Research Scientist
Global Research Institute, William & Mary

Eric Brown is a Senior Research Scientist at William & Mary's Global Research Institute, where he studies world politics, history, and security policy. Since joining GRI in 2022, he has been writing on Asia and developing new research and educational initiatives. He's also faculty guide to the Geopolitics of Technology Initiative. From 2004-2022, Brown was a senior fellow at Hudson Institute. There, he directed research and other programs on China, India, the Middle East and Central Asia, the Himalayas, and the Indo-Pacific, and on U.S. diplomacy and strategy. Brown serves on the governing board of the American University of Iraq at Sulaimani.



Michael Carney

President
U.S. Chamber of Commerce Foundation

Mike Carney is president of the U.S. Chamber of Commerce Foundation, where he oversees initiatives that harness the power of business for the good of America and the world.

At the Foundation, Carney has driven impactful projects such as Path Forward, an award-winning series that delivered critical information to millions during the pandemic, and the National Civics Bee, a fast-growing competition for middle schoolers in communities across the United States. In addition to helping the business community coordinate the global response to COVID-19, he has also expanded the Foundation's work on pressing issues like quantum computing and the economic effects of geopolitical instability.

Prior to becoming president, Carney led the organization's emerging issues, communications, and civics teams.

Carney's career spans journalism, public affairs, and strategic communications. His experience includes roles as a partner at a global communications firm and head of public affairs for an international organization.

His academic credentials include a bachelor's degree in political science from the State University of New York at Stony Brook, a master's degree from the Missouri School of Journalism, and a postgraduate diploma in Strategy & Innovation from the University of Oxford's Saïd Business School.

As president, Carney is committed to fostering collaboration between businesses and communities to address complex societal challenges.



General Peter Chiarelli (Retired)

President
Robert M. Gates Global Policy Center

Dedicated nearly 40 years of service to the United States. Chiarelli was the senior officer in charge of the Army Operations Center in the Pentagon on September 11, 2001.

He deployed the First Cavalry Division to Iraq in 2004-early 2005, and as Commander of the Multi-National Corps-Iraq in 2006, Chiarelli coordinated the actions of all four military services and was responsible for the day-to-day combat operations of more than 147,000 U.S. and Coalition troops.

Chiarelli pioneered efforts to restore government and economic stability as well as essential services during two tours in Iraq; exercised command and control of combat operations; and trained, prepared, and mobilized reserve forces for critical response operations. From March 2007 to August 2008, Chiarelli was the Senior Military Assistant to Secretary of Defense Robert M. Gates.

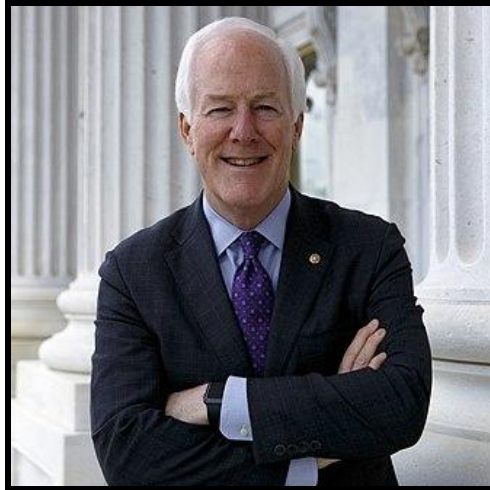
While serving as the 32nd Vice Chief of Staff between 2008-2012, Chiarelli led the daily operations of the Army and its 1.1 million soldiers both active and reserve. It was during this time that General Chiarelli advanced the efforts of the Department of Defense on post-traumatic stress (PTS), traumatic brain injury (TBI), and suicide prevention. He retired from the Army in 2012.

In retirement, General Chiarelli continued his advocacy on brain health and became the first CEO of One Mind, a not-for-profit organization advocating for and facilitating scientific and medical advancement to accelerate effective, lasting treatment for brain disease and injury as well as reducing stigma. Along with leading the organization's strategic initiatives, he worked expeditiously with members in the government,

General Peter Chiarelli (Retired) continued

corporate, scientific, and philanthropic communities to significantly accelerate large-scale research for brain illnesses and injuries through open science data sharing and collaboration. In 2013, Chiarelli received the Patriot Award, the Congressional Medal of Honor Society's highest honor, for his work to aid servicemen and women as well as their families suffering from the invisible wounds of war. Although General Chiarelli retired as One Mind CEO in 2018, he continues to advocate for this critical work.

A native of Washington State, Chiarelli holds a Bachelor of Science in Political Science from Seattle University, a Master of Public Administration from the Daniel J. Evans School of Public Affairs at the University of Washington, and a Master of Arts in National Security and Strategy from Salve Regina University. He is also a graduate of the College of Naval Command and Staff and the National War College.



Senator John Cornyn

Assistant Professor of International Security,
Schar School of Policy and Government, George Mason University

In 2020, Texans overwhelmingly re-elected Senator John Cornyn to represent them for a fourth term in the U.S. Senate. Since he was first elected in 2002, Sen. Cornyn has earned a national reputation as an articulate and powerful voice for Texas values in Washington. Sen. Cornyn, a San Antonio native, strongly believes that we need more Texas solutions in Washington, which is why he consistently fights to bring the Lone Star State's commonsense solutions to the federal level.

He is committed to strengthening our national defense, securing our borders, repairing our broken immigration system, and fostering economic development by keeping taxes low, reducing federal spending, and fighting job-killing regulations from Washington bureaucrats. Sen. Cornyn is also a tireless advocate for Texas military personnel, veterans, and their families, and he has fought year after year to provide these brave Americans with greater support, care, and benefits.

Sen. Cornyn serves on the Senate Finance, Intelligence, and Judiciary Committees, where he helps craft legislation on behalf of more than 30 million Texans. From 2013 until 2018, Sen. Cornyn was chosen by his colleagues to serve as the Whip, the second-highest ranking position in the Senate Republican Conference.

Sen. Cornyn has served the people of Texas for nearly four decades, first as a district judge and later as a member of the Texas Supreme Court and Texas Attorney General. He received his undergraduate degree from Trinity University, his law degree from St. Mary's School of Law, and his LLM from the University of Virginia Law School.

Sen. Cornyn married his wife Sandy in 1979, and they have two grown daughters.



Samantha Custer

Director of Policy Analysis Unit, AidData
Global Research Institute, William & Mary

Samantha Custer founded and directs AidData's Policy Analysis Unit at William & Mary's Global Research Institute. A driving motivation for Custer's work as an international relations scholar-practitioner is to help decision-makers quantify concepts, activities, and trends that are historically opaque or difficult to measure. Her interdisciplinary research team answers complex questions at the intersection of development, diplomacy, and security. Over the last decade, she has designed, implemented, and overseen more than 60 policy-relevant research projects and mobilized over \$20 million in externally sponsored funding. Her research examines how great powers employ economic statecraft and public diplomacy instruments to advance their national interests and surveys decision-makers in low- and middle-income countries regarding the impacts of external money and ideas on domestic policy reforms.

Custer has produced research studies in partnership with U.S. government agencies (State, USAID), leading think tanks (the Brookings Institution, CSIS, the Asia Society Policy Institute), private philanthropies (Ford, Hewlett, Gates), and foreign governments (Denmark, Germany, and the UK). Her research has been published in industry-recognized policy and academic outlets such as the *American Journal of Political Science*, *Elgar Online Handbook of Public Administration Reform*, the *Journal of International Cooperation in Education*, the *National Bureau of Asian Research's Strategic Asia*, and the *OECD's Development Cooperation Report*. Custer previously served as the intellectual lead for the first two Gates Policy Forums, working with former U.S. Secretary of Defense Robert M. Gates and the Gates Global Policy Center to architect research volumes used by conferees to deliberate policy options to strengthen U.S. strategic communications and development assistance. She also designed, taught, and delivered a series of strategic broadening seminars for

Samantha Custer continued

mid-career civilian and military leaders with the W&M Whole of Government Center of Excellence on the influence playbooks of great powers.

Before AidData, Custer was Director for Language, Education and Development (LEAD) Asia for SIL International, providing consulting support for partners in 13 countries, overseeing two country offices, and coordinating the Asia Multilingual Education Working Group for UNESCO Bangkok. She served as SIL's Associate Director for West Indonesia, brokering partnerships with the government, coordinating with local partners, and overseeing community-led multilingual education programs in three provinces. Custer has also previously researched open data movements and citizen feedback initiatives with the World Bank, co-taught a class on U.S. national security with former U.S. Secretary of State Madeleine Albright, and conducted performance monitoring for Save the Children U.S. to ensure sponsored children were benefiting from its community development programs. She holds a Master of Science in Foreign Service and a Master of Public Policy from Georgetown University and completed a graduate certificate in survey research from the University of Connecticut.



Dr. Daniel W. Drezner

Distinguished Professor of International Politics
Fletcher School of Law and Diplomacy, Tufts University

Daniel W. Drezner is distinguished professor of international politics at the Fletcher School of Law and Diplomacy at Tufts University, a nonresident senior fellow at the Chicago Council on Global Affairs, and an academic partner at State Street Associates. He is the co-director of Fletcher's Russia and Eurasia program. Prior to Fletcher, he taught at the University of Chicago and the University of Colorado at Boulder. He has previously held positions with Civic Education Project, the RAND Corporation and the U.S. Department of the Treasury, and received fellowships from the Rockefeller Foundation, German Marshall Fund of the United States, Council on Foreign Relations, and Harvard University. Drezner has written seven books, including *The Ideas Industry* and *All Politics is Global*, and edited three others, including *The Uses and Abuses of Weaponized Interdependence*. He has been a regular columnist and contributing editor for *Foreign Policy*, *The National Interest*, the *Washington Post*. He received his B.A. in political economy from Williams College and an M.A. in economics and Ph.D. in political science from Stanford University. He co-hosts the *Space the Nation* podcast and publishes the newsletter *Drezner's World*.



Yaya Jata Fanusie

Director of Policy for AML & Cyber Risk
Crypto Council for Innovation

Yaya J. Fanusie is Director of Policy for AML & Cyber Risk at the Crypto Council for Innovation. He is a pioneer in the research and analysis of U.S. national security issues relating to digital assets. Earlier in his career, he spent seven years as both an economic and counterterrorism analyst in the CIA, where he regularly briefed federal law enforcement, U.S. military personnel, and White House-level policy makers—including President George W. Bush whom he personally briefed on terrorism threats. In 2009, he spent three months in Afghanistan providing analytic support to senior military officials.

After leaving government service, Yaya worked for a small consulting firm on a global financial asset recovery investigation of a kleptocratic regime. Later, he joined the think tank world and as Director of Analysis at the Foundation for Defense of Democracies' Center on Sanctions and Illicit Finance, Yaya led research on sanctions evasion and terrorist financing threats. As part of this work, in 2016 he began tracking the illicit use of crypto and wrote some of the first public analysis on a terrorist crypto crowdfunding campaign. He later published a major study on efforts by Russia, Iran, Venezuela, and China to build national blockchain infrastructure.

Yaya is a Visiting Fellow at Georgetown's Psaros Center for Financial Markets and Policy. He has served as an Adjunct Senior Fellow at the Center for a New American Security (CNAS) where his research focused on crypto, blockchain, and central bank digital currencies (CBDCs). Yaya has testified before Congress multiple times on illicit financing issues and is a leading expert on China's CBDC. He has appeared on CNN, Fox News, Bloomberg TV, and CNBC, and has been quoted in the New York Times, the Wall Street Journal, the Washington Post, and the LA Times.

Yaya Jata Fanusie continued

Yaya is a creative and an educator. He is the producer of the audio spy thriller podcast called The Jabbari Lincoln Files. He also hosts the podcast DESIGNATED with Yaya Jata Fanusie for Illicit Edge media, where he interviews financial crime fighters and economic warriors. In 2018, he developed and taught an Introduction to Blockchain Technology course at Morgan State University in Baltimore. And he worked as a high school math teacher in Washington DC before his career in the US government.

Yaya received an MA in International Affairs from Columbia University's School of International and Public Affairs and a BA in Economics from UC Berkeley.



Edward Fishman

Senior Research Scholar
Columbia University's Center on Global Energy Policy

Edward Fishman teaches at Columbia University's School of International and Public Affairs and is a Senior Research Scholar at the Center on Global Energy Policy. He is the author of the forthcoming book *Chokepoints: American Power in the Age of Economic Warfare*, which will be published by Portfolio/Penguin Random House in February 2025.

Between 2011 and 2017, Fishman served in key foreign policy roles across the U.S. government. At the State Department, he served as a member of the Secretary of State's Policy Planning Staff, where he advised Secretary John Kerry on Europe and Eurasia and led the staff's work on economic sanctions, long-range strategic planning, and international order and norms. Fishman was also the Russia and Europe Lead in the State Department's Office of Economic Sanctions Policy and Implementation, where he played a central role in designing and negotiating international sanctions in response to Russia's aggression in Ukraine. Earlier, Fishman served as a member of the Iran sanctions team, where he developed policies to strengthen sanctions against Iran and maintain pressure during the negotiations that led to the Iran nuclear deal. Outside of the State Department, Fishman has served at the Pentagon as special assistant to the Chairman of the Joint Chiefs of Staff, at the Treasury Department as special assistant to the Under Secretary for Terrorism and Financial Intelligence, and at *Foreign Affairs* as a member of the editorial staff. Fishman is a recipient of the State Department's Superior Honor Award (twice) and its Meritorious Honor Award, having been recognized for his contributions to U.S. policy toward Ukraine, Russia, Belarus, and Iran.

Edward Fishman continued

Fishman writes frequently for publications including *The New York Times*, *The Wall Street Journal*, *The Washington Post*, *Foreign Affairs*, and *Politico*, and his analysis is regularly featured by leading print, digital, and broadcast media outlets. He also advises companies on geopolitical strategy and invests in early-stage technology startups. He holds a B.A. in History from Yale, an M.Phil. in International Relations from Cambridge, and an M.B.A. from Stanford. He lives in New York City with his wife and two children.



Benjamin Frohman

National Security Advisor to Congressman Krishnamoorthi
House Select Committee on the Strategic Competition between the
United States and the Chinese Communist Party

Ben Frohman serves as National Security Advisor to Ranking Member Raja Krishnamoorthi (D-IL) on the House Select Committee on the Strategic Competition between the United States and the Chinese Communist Party. Prior to joining the committee, Ben served as Chief of Strategy and Policy at the research firm Exovera, LLC, where he led analysis on China's grand strategy, political system, and military capabilities. He previously spent 11 years in federal government service, including as Director for Security and Foreign Affairs at the U.S.-China Economic and Security Review Commission, a bipartisan Congressional advisory body on China policy, and in the U.S. Department of Defense. Ben received his B.S. in Foreign Service from Georgetown University's Walsh School of Foreign Service and is studying for an M.A. in Government from Harvard University's School of Extension Studies. He is a fluent Mandarin speaker.



Michael B. Greenwald

Global Head of Financial Innovation and Digital Assets
Amazon Web Services

Michael B. Greenwald is the Global Head of Financial Innovation and Digital Assets at Amazon Web Services (AWS). He also heads up Global Executive Relations for the company pioneering thought-leadership on artificial intelligence for the Worldwide Public Sector Business. Michael focuses on working with the U.S. Government (USG) and international governments to incorporate cloud computing into their systems as well as drive responsible emerging technology innovation and implementation within the public sector market.

In 2023, Michael was appointed by the U.S. Commodity Futures Trading Commission (CFTC) to represent Amazon on the CFTC's Technology Advisory Committee. He helps the CFTC carry out its mission of fostering open, transparent, competitive, and financially sound markets and examining the impact and implications of technological innovation in the financial services, derivatives, and commodity markets. He co-authored an Amazon publication titled: The convergence of artificial intelligence and digital assets: A new dawn for financial infrastructure.

Prior to Amazon, he was a managing director of Digital Asset Education and Chief Geopolitical Risk Officer for global asset management firm ALTi Global. He previously worked for the U.S. Treasury Department for almost a decade. He served in senior policy and intelligence roles in Europe and Africa for two presidential administrations and three Treasury Secretaries culminating with becoming the first U.S. Treasury attaché to Qatar and Kuwait, acting as the principal financial diplomat to the banking sector in those nations.

Michael B. Greenwald continued

He is a Adjunct Associate Professor of International and Public Affairs at Columbia SIPA and a former Adjunct professor at Boston University Pardee School of Global Studies, a senior fellow at the Atlantic Council as well as Center for New American Security, Deputy Director of the Trilateral Commission, member of the Bretton Woods Committee, and senior advisor to Wharton Cypher Accelerator. He was a fellow at Harvard Kennedy School's Belfer Center where he published over 50 articles.

He is a graduate of Harvard Business School and has a Juris Doctor graduate from Boston University School of Law, a Master's graduate from Boston University's Frederick S. Pardee School of Global Studies, and a B.A. from George Washington University. Raised in Brookline, Massachusetts, he lives in Palm Beach, Florida with his wife Nolan and served on the Board of The Town of Palm Beach Investment Committee. He was honored by Palm Beach Illustrated as one of the city's 100 most influential business leaders in 2021.



Peter E. Harrell

Non-resident Fellow
Carnegie Endowment for International Peace

Peter E. Harrell is a non-resident fellow at the Carnegie Endowment for International Peace and an attorney in private practice who advises on economic sanctions and other international regulatory matters.

From January 2021 through 2022, Harrell served at the U.S. White House as Senior Director for International Economics, jointly appointed to the National Security Council and the National Economic Council. In that role, Harrell worked on supply chain resilience, trade policy, CFIUS and global investment issues, sanctions, including sanctions on Russia following its invasion of Ukraine in 2022, cross-border data flows and digital policy, international telecommunications policy, and other areas of international economic policy.

Harrell is a leading scholar and commentator on a range of international economic policy matters. His articles and op-eds have appeared in publications including the Wall Street Journal, the New York Times, Foreign Affairs, Foreign Policy, Politico, and Lawfare, among other outlets. He has testified in front of multiple congressional committees.

From 2015 to early 2021, Harrell was an attorney in private practice and served as Adjunct Senior Fellow at the Center for a New American Security. From 2012 to 2014, Harrell served as the Deputy Assistant Secretary for Counter Threat Finance and Sanctions in the State Department's Bureau of Economic and Business Affairs. From 2009 to 2012 he served on the State Department's Policy Planning Staff, where he was instrumental in developing Secretary of State Hillary Clinton's economic statecraft agenda.

Peter E. Harrell continued

Earlier in his career, Harrell served on President Barack Obama's 2008 campaign and as a reporter for Congressional Quarterly in Washington, DC.

Harrell is a magna cum laude graduate of Princeton University and holds a JD from the Yale Law School.



Representative French Hill

United States Representative
Arkansas

Congressman French Hill, a ninth generation Arkansan, has represented Arkansas's Second Congressional District since 2015. As the founder and former Chairman and Chief Executive Officer of Delta Trust & Banking Corp., Rep. Hill brings to Congress his considerable knowledge in the financial services industry and real world experience to apply to real world issues – both domestic and international. At the start of the 118th Congress, he was named Chairman of the newly formed Digital Assets Subcommittee and the Vice Chairman of the full committee, and is a regular on Squawk Box, Bloomberg, Fox News, and CNN among others.

Rep. Hill also sits on the House Foreign Affairs Committee, where he is the Vice Chairman of the subcommittee that oversees U.S. involvement in international organizations such as the United Nations, and on the House Permanent Select Committee for Intelligence.

A born public servant, his prior work in Washington, DC, first as U.S. Senate staff to the late Sen. John Tower of Texas and later in the Treasury Department and the White House for President George H.W. Bush, informs his work on key issues from trade to entrepreneurial and corporate management to the defense of our borders and safety of our troops and allies abroad.



Emily Kilcrease

Senior Fellow and Director, Energy, Economics, and Security Program
Center for a New American Security

Emily Kilcrease is a Senior Fellow and Director of the Energy, Economics, and Security Program at CNAS. Her research focuses on the U.S.-China economic relationship; alignment of national security objectives and economic policy; and geoeconomic statecraft.

Kilcrease previously served as a deputy assistant U.S. trade representative (USTR), overseeing the development, negotiation, and coordination of U.S. foreign investment policy. She served as the senior career staffer leading USTR's work on the Committee on Foreign Investment in the United States (CFIUS) and coordinated USTR's policy engagement on related national security and economic tools, including export controls and supply chain risk management. She played a lead role in drafting CFIUS reform regulations, with a focus on transactions involving

critical technology and sensitive personal data. She was involved in the negotiation and enforcement of the Phase One Agreement with China, trilateral work with the EU and Japan to counter unfair Chinese trade practices, and the initial negotiations for a free trade agreement with the United Kingdom.

Previously, Kilcrease served on the National Security Council (NSC) as a director for international trade, investment, and development. She focused on reforming U.S. development finance authorities and launched the interagency effort that resulted in the BUILD Act, as well as coordinating policy on women's economic empowerment. Prior to the NSC, she served at the Department of Commerce overseeing the department's CFIUS work. She began her government service at the Department of Interior working on trade and environment policy.

Emily Kilcrease continued

Kilcrease's commentary has been cited by major national press outlets, including The New York Times, The Wall Street Journal, Financial Times, Reuters, NPR, and ABC News. She has testified on coercive economic statecraft before the U.S.-China Economic and Security Review Commission.

Kilcrease received her MA in international relations, with a concentration in international development and economics, from the Johns Hopkins School of Advanced International Studies. She received her BA in government from Georgetown University.



Representative Raja Krishnamoorthi

United States Representative
Illinois

Congressman Raja Krishnamoorthi was elected to Congress in 2016 and is now in his fourth term representing Illinois' 8th District, which includes Chicago's west and northwest suburbs as well as the 41st ward of the city. He serves as Ranking Member of the Select Committee on Strategic Competition Between the United States and the Chinese Communist Party, making him the first South Asian American in history to lead a Congressional Committee. He also serves on the House Permanent Select Committee on Intelligence and the Committee on Oversight and Accountability as Ranking Member of the Subcommittee on Health Care and Financial Services. The Congressman is a Vice-Chair of the Equality Caucus and Co-Chair of the Congressional Asian Pacific American Caucus (CAPAC) Immigration Task Force. In addition, he is the founder and Chairman of the bipartisan Congressional Caucus to End the Youth Vaping Epidemic and the bipartisan Solar Caucus.

Representative Krishnamoorthi is the child of immigrants and was raised in Peoria, Illinois. He attended public schools in Peoria and was a valedictorian of his high school class. Scholarships and student loans allowed him to graduate summa cum laude from Princeton University with a degree in mechanical engineering and a certificate from the Princeton School of Public and International Affairs. He then graduated with honors from Harvard Law School and clerked for a federal judge before practicing law in Chicago.

Representative Krishnamoorthi pursued public service while practicing law and was appointed by Illinois Attorney General Lisa Madigan as a Special Assistant Attorney General to help start the state's Public Integrity Unit created to root out corruption in Illinois. As a member of the Illinois Housing Development Authority, the Congressman

Congressman Raja Krishnamoorthi continued

chaired the Audit Committee, helping to provide thousands of low and moderate-income families across the state with affordable housing. Congressman Krishnamoorthi also served as Illinois Deputy Treasurer, where he oversaw the state's technology venture capital fund and helped make programs such as the state's unclaimed property program leaner and more efficient.

After his time in the Illinois Treasurer's Office, Representative Krishnamoorthi returned to the private sector, serving as President of a research-oriented small businesses developing technology in the national security and renewable energy industries. Representative Krishnamoorthi also served as the Vice-Chair of the Illinois Innovation Council and co-founded InSPIRE, a non-profit that provides inner-city students and veterans with training in solar technology.

The Congressman resides with his wife Priya, a physician, and 3 children in Schaumburg, Illinois.



Daniel McDowell

Advisory Board Professor of International Affairs
Maxwell School of Citizenship and Public Affairs, Syracuse University

Daniel McDowell is Maxwell Advisory Board Professor of International Affairs at the Maxwell School of Citizenship and Public Affairs at Syracuse University and a Senior Fellow at the Atlantic Council's GeoEconomics Center. He is a former Wilson Center China Fellow. As a scholar, McDowell specializes in the study of financial sanctions, the dynamics of international currency competition, and financial crisis management, with an emphasis on the United States and China in these arenas. The author of many peer-reviewed academic articles, he has also written two books including *Bucking the Buck: US Financial Sanctions and the International Backlash Against the Dollar*, published by Oxford University Press in 2023.



Dr. Ryan Musto

Director of Forums and Research Initiatives
Global Research Institute, William & Mary

Ryan A. Musto is the Director of Forums and Research Initiatives with the Global Research Institute (GRI) at William & Mary. He helps GRI researchers to scale their work and organizes large-scale convenings that bridge the academic-policy divide. By training, Musto is a diplomatic historian with concentrations in nuclear and Cold War international history. He is currently completing a book manuscript on the international history of regional nuclear weapon free zones. Musto previously served as a MacArthur Nuclear Security Postdoctoral Fellow with the Center for International Security and Cooperation (CISAC) at Stanford University and as a Stanton Nuclear Security Postdoctoral Fellow at the Massachusetts Institute of Technology (MIT). He holds a Ph.D. in history from The George Washington University, master's degrees in international and world history from Columbia University and the London School of Economics, and a B.A. (hons.) in history from New York University (NYU).



Richard Nephew

Senior Research Scholar and Adjunct Professor
School of International and Public Affairs, Columbia University's Center on
Global Energy Policy

Richard Nephew is a Senior Research Scholar and Adjunct Professor at the School of International and Public Affairs at Columbia University's Center on Global Energy Policy. Nephew joined Columbia in 2015 and, since that time, he has written dozens of reports and articles for various publications focused on geopolitics and their intersection with energy markets, economic statecraft, nuclear topics, and sanctions. He is also the author of *The Art of Sanctions: A View from the Field*, published by Columbia University Press in 2018. Nephew is also an Adjunct Fellow at the Washington Institute for Near East Policy and was a Non-Resident Senior Fellow at the Brookings Institution from 2015-2021.

He has spent much of his career in the U.S. government in various capacities. From 2022-2024, he was the inaugural U.S. Coordinator on Global Anti-Corruption at the Department of State (2022-2024). He was also elected as the President of the Conference of the States Parties to the UN Convention against Corruption in December 2023. In previous incarnations, he served as the Deputy Special Envoy for Iran (2021), Principal Deputy Coordinator for Sanctions Policy at the Department of State (2013-2015), and Director for Iran at the National Security Council (2011-2013), among other senior civil service staff roles from 2003-2011.

Nephew holds a Masters in Security Policy Studies and a Bachelors in International Affairs, both from The George Washington University. He is married with three children.



Dr. William Norris

Associate Professor of Chinese Foreign and Security Policy
The Bush School of Government and Public Service, Texas A&M University

Dr. William Norris is currently an associate professor of Chinese foreign and security policy at the George Bush School of Government and Public Service at Texas A&M University where he teaches graduate-level courses in Chinese domestic politics, East Asian security, and Chinese foreign policy. Dr. Norris has been an associate with the Nuclear Policy Program at the Carnegie Endowment for International Peace in Washington D.C. where his work examined the potential for a conventional US-China conflict to escalate to the nuclear realm. He was also a postdoctoral research associate at the Woodrow Wilson School for Public and International Affairs and a fellow in the Princeton-Harvard China and the World Program, a joint program created by the two universities to foster the study of China's foreign relations. He completed his doctoral work in the Security Studies Program in the Department of Political Science at Massachusetts Institute of Technology where he specialized in the confluence of economics and security, focusing on the role of economics in contemporary Chinese grand strategy.

His broad research interests include East Asian security, business-government relations, Chinese foreign and security policy, and international relations theory—particularly the strategic relationship between economics and national security. His work examines the use of commercial sector actors to achieve national foreign policy objectives in the context of Chinese grand strategy. His most recent book is entitled: *Chinese Economic Statecraft: Commercial Actors, Grand Strategy, and State Control* (Cornell University Press 2016).

Dr. William Norris continued

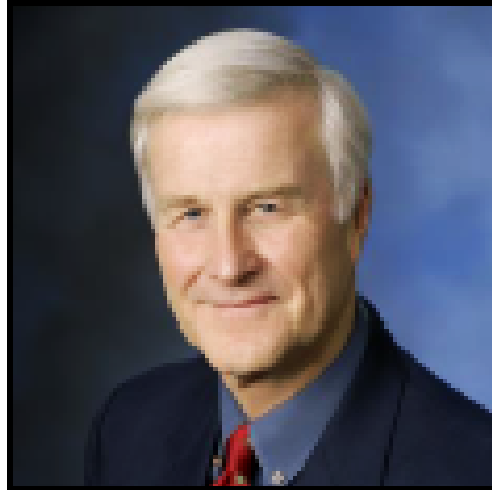
Dr. Norris has been the recipient of various fellowships and awards, including the Stanton Nuclear Security Fellowship, the Asia Foundation's Domestic Dimension of International Affairs Grant, Bush School Faculty Excellence Award, Smith Richardson Foundation World Politics and Statecraft Fellowship, the Kathryn Wasserman Davis Scholarship, the David L. Boren National Security Education Fellowship, and the Bradley Fellowship. He was recently named a Student Success Faculty Fellow by the Center for Teaching Excellence at Texas A&M University and was selected as a fellow with the Public Intellectuals Program of the National Committee on US-China Relations. Dr. Norris directs the Bush School's Concentration in China Studies and serves on the Faculty Advisory Board of the Scowcroft Institute of International Affairs.



Vance Serchuk

Executive Director
KKR Global Institute

Vance Serchuk is the Executive Director of the KKR Global Institute, the geopolitical analysis unit of the investment firm KKR, where he is also a Managing Director on the Americas Private Equity Industrials Team responsible for defense and aerospace investments. He is on the board of three KKR portfolio companies: CIRCOR (actuation products for naval and aerospace platforms), Novaria Group (hardware components for commercial and military aerospace), and Advanced Navigation (assured Position Navigation and Timing for defense). Vance is also a Visiting Fellow at the Hoover Institution at Stanford University and an Adjunct Senior Fellow at the Center for a New American Security in Washington, DC. Prior to joining KKR, Vance served for six years as the foreign policy advisor to Senator Joseph Lieberman (I-CT) and as a professional staff member on the Senate Homeland Security and Governmental Affairs Committee. He is a graduate of Princeton University and Yale Law School and he was a Fulbright Scholar in Russia. Vance is a lieutenant commander in the U.S. Navy Reserve, currently assigned to the Pacific Fleet. He is a trustee of the American University of Iraq Suleimani and serves on the boards of the Afghan Future Fund and Radio Free Europe / Radio Liberty.



Craig Stewart

President and Trustee
Apex/Bruce R. McCaw and Jolene M. McCaw Family Foundation

Craig Stewart is President and Trustee of the Apex/Bruce R. McCaw and Jolene M. McCaw Family Foundation in Bellevue, Washington. He began this work in 1996.

Craig currently serves as an advisor or board member for Behind the Badge Foundation, Congressional Medal of Honor Society, Cristo Rey Schools, Rainier Scholars, Fred Hutchison Cancer Research Center, Life Support and Bradley Family Foundation.

Following active military service as an airborne infantry officer and a stint with government intelligence and Standard Oil of Ohio, Craig began development work as Dean of Students and then Vice President, University Relations at Lewis University in Lockport, Illinois. He has served as Chief Development Officer at Regis University in Denver, Colorado and Loomis Chaffee School in Windsor, Connecticut. He was Director of Development at Lakeside School in Seattle, WA from 1986 to 1996. He continues to advise a number of organizations on governance, strategic planning, and funding issues.

Craig co-authored a book with the late William Golding on trusteeship titled Inside the Nonprofit Boardroom, which is in its second edition.

A 1963 graduate of Middlebury College in Vermont, he received his Bachelor of Arts in Political Science, followed by an MA degree in Ethnic Studies from Governors State University in Illinois. Craig earned an Ed.D from Western Colorado University.

Craig and his wife, Val, reside in Port Townsend, WA. They have two grown children and their families who live and work in Seattle.



Dan Wachtler

CEO
DarkLight, Inc.

Dan Wachtler is a dynamic and visionary executive with over 20 years of experience in scaling businesses, strategic leadership, and capital formation. He currently serves as CEO of DarkLight, Inc., a cutting-edge cybersecurity firm specializing in active defense solutions derived from pioneering work at a Department of Energy national laboratory. Under Dan's leadership, DarkLight has defined its growth trajectory, secured critical financing, and achieved significant commercial milestones.

Previously, Dan was President and COO of root9B Holdings, Inc., a publicly traded cybersecurity company. He successfully led the company through a corporate restructuring and up-listing to the Nasdaq Exchange. His strategic leadership elevated root9B to the top of the prestigious "Cybersecurity 500" list, cementing its status as a leading pure-play cybersecurity provider.

Before entering the cybersecurity field, Dan's focus was on financial crime compliance. As President and CEO of IPSA International, a global risk advisory firm, he led a management buyout in 2005 and transformed the company into a leader in areas such as anti-money laundering (AML), counter-terrorist financing (CFT), and Office of Foreign Assets Control (OFAC) compliance. Under his direction, IPSA expanded its operations globally, with offices in London, Dubai, and Hong Kong, and provided advisory services to major U.S. and foreign financial institutions in retail banking, offshore private banking, and correspondent banking. Subsequently, Dan sold IPSA to root9B Holdings, Inc. where he joined the Board of Directors and senior leadership team.

Dan Wachtler continued

Dan's expertise in navigating complex regulatory environments, including advising on frameworks such as the Foreign Corrupt Practices Act (FCPA) and the UK Bribery Act, helped IPSA secure work with some of the world's largest financial institutions. His leadership played a critical role in guiding clients through high-stakes regulatory challenges, enabling them to meet stringent compliance requirements.

A recognized thought leader in both cybersecurity and financial crime compliance, Dan is a frequent speaker at prominent conferences, including the Global Citizenship Forum and the Journal of Law and Cyberwarfare Symposium. He is an active member of the Advisory Board for the Foundation for Defense of Democracies (FDD) and its Center on Cyber and Technology Innovation project. He also serves on the Board of the Global Cyber Institute at UCLA and was a long-time Board Member of BritishAmerican Business.



Dr. Ketian Zhang

Assistant Professor of International Security,
Schar School of Policy and Government, George Mason University

Ketian Vivian Zhang is an assistant professor of international security in the Schar School of Policy and Government at George Mason University. Ketian is also a national security fellow with the Penn Project on the Future of US-China Relations. Ketian studies rising powers, coercion, economic statecraft, and maritime disputes in international relations and social movements in comparative politics, with a regional focus on China and East Asia. Her first book, titled *China's Gambit*, from Cambridge University Press examines when, why, and how China uses coercion when faced with issues of national security, such as territorial disputes in the South and East China Seas, foreign arms sales to Taiwan, and foreign leaders' reception of the Dalai Lama. Part of her research has appeared in *International Security*, *Journal of Strategic Studies*, *Journal of Contemporary China*, and *Texas National Security Review*, among other venues. Ketian is currently working on her second book that explores the relationship between economic interdependence and rising power grand strategies. Ketian received her PhD in political science from the Massachusetts Institute of Technology in 2018, and is also a proud badger.