

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: Deena Tauster
2. a. Name of Accompanying Relative: _____ **OR** None
b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates: Departure: 2/17/25 Return: 2/21/25
b. Dates at Personal Expense, if any: _____ **OR** None
4. Departure City: Philadelphia Destination: Mexico City Return City: Washington, DC
5. Sponsor(s), Who Paid for the Trip: Center Forward
6. Describe Meetings and Events Attended: Met with Mexican government officials and businesses regarding border security/immigration, tariffs and the U.S.-Mexico relationship.
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: 3/5/25

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. Andrew Garbarino Date: 3/5/25

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: Center Forward

2. Travel Destination(s): Mexico City, Mexico

3. Date of Departure: Monday, February 17, 2025 Date of Return: Friday, February 21, 2025

4. Name(s) of Traveler(s): Deena Tauster

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 | \$885.14 | \$876.00 | \$191.00 | \$5.00 (Museum ticket) |
| Accompanying Family Member | \$0.00 | \$0.00 | \$0.00 | \$0.00 |

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: Friday, February 21, 2025

Name: Riley Kilburg Title: Executive Director

Organization: Center Forward

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

Address: 1214A Ingleside Ave, McLean, VA 22101

Telephone: 563-542-6821 Email: riley@center-forward.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: Deena Tauster

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

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

Signature: _____

Name of Signatory (if other than traveler): _____

For Staff (name of employing Member or Committee): Rep. Andrew Garbarino

Office Address: 2344 Rayburn House Office Building

Telephone Number: 5-7896

Email Address of Contact Person: deena.tauster@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: Deena Tauster
2. Sponsor(s) who will be paying or providing in-kind support for the trip: Center Forward
3. City and State **OR** Foreign Country of Travel: Mexico
4. a. Date of Departure: 2/17/25 Date of Return: 2/21/25
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.**
As Chief of Staff to a member of the Financial Services Committee, discussions about cross border trade and investment, and other business dynamics, will inform our economic policy work.
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: 1/16/25

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:

Center Forward

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): Please see attached.

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

6. Date of Departure: Monday, February 17, 2025 Date of Return: Friday, February 21, 2025

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

b. Destination(s): Mexico City, Mexico

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

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:

Please see attachment.

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): \$40 (Day 1) + \$90 (Day 2) + \$90 (Day 3)
 - 2) Provide the reason for selecting the location of the event or trip: Please see attachment.

16. Name, nightly cost, and reasons for selecting each hotel or other lodging facility:

Hotel Name: InterContinental President City: Mexico City Cost Per Night: \$245 USD
Reason(s) for Selecting: Safe and central location for site visits and government meetings as well as
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 | \$1,200.00 (airfare + ground transportation) | \$940.00 | \$220.00 |
| For each Accompanying Family Member | \$0.00 | \$0.00 | \$0.00 |


| | 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 | \$15.00 | Anthropology Museum Tickets |
| For each Accompanying Family Member | \$0.00 | N/A |

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: Thursday, January 9, 2025
 Name: Riley Kilburg Title: Executive Director
 Organization: Center Forward
 Address: 1214A Ingleside Avenue, McLean, VA 22101
 Email: riley@center-forward.org Telephone: (563) 542-6821

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



U.S. House of Representatives

COMMITTEE ON ETHICS

Washington, DC 20515

February 13, 2025

Ms. Deena Tauster
Office of the Honorable Andrew R. Garbarino
2344 Rayburn House Office Building
Washington, DC 20515

Dear Ms. Tauster:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to Mexico,¹ scheduled for February 17 to 21, 2025, sponsored by Center Forward.

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.

Because the trip may involve meetings with foreign government representatives, we note that House employees may accept, under the Foreign Gifts and Decorations Act (FGDA), gifts "of minimal value [currently \$480] tendered as a souvenir or mark of courtesy" by a foreign government. Any tangible gifts valued in excess of minimal value received from a foreign government must, within 60 days of acceptance, be disclosed on a Form for Disclosing Gifts from Foreign Governments and either turned over to the Clerk of the House, or, with the written approval of the Committee, retained for official use.

¹ Please be aware that the Committee's review of the proposed trip does not extend to either the security situation in the destination country or security related to foreign travel in general. We recommend you contact the Office of House Security (OHS) for a safety and security briefing prior to your departure. OHS may be reached at (202) 226-2044 or ohsstaff@mail.house.gov. House travelers should also register for the U.S. State Department's Smart Traveler Enrollment Program at <https://step.state.gov>.

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

Sincerely,



Michael Guest
Chairman



Mark DeSaulnier
Ranking Member

MG/MD:mc

1. The first part of the document discusses the importance of maintaining accurate records of all transactions and activities. It emphasizes that this is crucial for ensuring transparency and accountability in the organization's operations.

2. The second part outlines the various methods and tools used to collect and analyze data. This includes both traditional manual processes and modern digital technologies, highlighting the benefits of automation and data-driven insights.

3. The third section focuses on the challenges and risks associated with data management, such as data security, privacy concerns, and the potential for data loss or corruption. It provides strategies to mitigate these risks and ensure the integrity of the information.

4. The fourth part discusses the role of data in decision-making and strategic planning. It explains how data analysis can help identify trends, opportunities, and areas for improvement, leading to more informed and effective business decisions.

5. The final section concludes by summarizing the key points and emphasizing the ongoing nature of data management. It stresses the need for continuous monitoring, updates, and collaboration across all levels of the organization to maintain a robust and reliable data ecosystem.

Private Sponsor Travel Certification Form: Supplemental

4.

| First | Last | Title | Affiliation | Reason |
|-----------|----------|--------------------|---------------------------------------|--|
| A. Brooke | Bennett | Chief of Staff | Office of Rep. French Hill (R-AR) | As Chief of Staff to the Chairman of the House Committee on Financial Services, Ms. Bennett can speak to the committee's priorities in the 119th Congress as it pertains to taxes and the digital transformation of the global economy. |
| Cara | Camacho | Chief of Staff | Office of Rep. Jim Himes (D-CT) | As Chief of Staff to a Member of the House Financial Services Committee, Ms. Camacho can speak to foreign direct investment between in the U.S. and Mexico. |
| Yvanna | Cancela | Chief of Staff | Office of Rep. Steven Horsford (D-NV) | As Chief of Staff to a Member of the House Committee on Ways & Means, Ms. Cancela can speak to the committee's priorities on federal spending, trade agreements like the USMCA, the impact of tariffs on the U.S.-Mexico relationship. |
| Chris | Crawford | Chief of Staff | Office of Rep. Buddy Carter (R-GA) | As Chief of Staff to a Member of the House Committee on Energy and Commerce, Mr. Crawford can speak to the committee's priorities on foreign commerce, innovative technologies, and the importance of energy reform to the success of businesses across all of industry. |
| Regan | Delaney | Executive Director | Republican Governance Group | As Executive Director of the Republican Governance Group, Ms. Delaney can speak to the bipartisan priorities of the caucus and mainstream ideas that bring together Members across the aisle. |

| | | | | |
|---------|-----------------|----------------|--|--|
| Justin | German | Chief of Staff | Office of Rep. Haley Stevens (D-MI) | As Chief of Staff to a Member of the House Committee on Education and Labor, Mr. German can speak to the impact of immigration on the American workforce and the workforce protection issues facing the auto manufacturing industry. |
| Sarah | Kaplan Feinmann | Chief of Staff | Office of Rep. Lizzie Fletcher (D-TX) | As Chief of Staff to a Member of the House Committee on Energy and Commerce, Ms. Kaplan Feinmann can speak to the upcoming USMCA renewal and potential renegotiation. |
| Carolyn | King | Chief of Staff | Office of Rep. Rob Wittman (R-VA) | As Chief of Staff to a Member of the House Select Committee on Strategic Competition between the United States and the Chinese Communist Party, Ms. King can speak to how maintaining the U.S.-Mexico relationship can hold off Chinese influence in the region. |
| Macey | Matthews | Chief of Staff | Office of Rep. Brittany Pettersen (D-CO) | As Chief of Staff to a Member of the House Committee on Financial Services, Ms. Matthews can share her perspective on investment in small businesses and creating a thriving economy for working families in both the U.S. and Mexico. |
| Bo | Morris | Chief of Staff | Office of Rep. Joe Neguse (D-CO) | As Chief of Staff to a Member of the House Judiciary Committee, Mr. Morris can speak to the bipartisan actions Congress is taking to prevent drugs from crossing the U.S. border, bolster national security measures, and safeguard U.S. intellectual property. |
| Jenifer | Nawrocki | Chief of Staff | Office of Rep. John Rutherford (R-FL) | As Chief of Staff to a Member of the House Committee on Appropriations, Ms. Bradley can speak to the use of federal funding for supporting the digital transformation. |

| | | | | |
|--------|----------|----------------|--|--|
| Cesar | Prieto | Chief of Staff | Office of Rep. Tony Gonzales (R-TX) | As Chief of Staff to the chair of the For Country Caucus, Mr. Prieto can speak to the national security priorities of the bipartisan caucus, and the U.S. and Mexico can better work together in keeping both of our nations safe and secure. |
| Andrew | Renteria | Chief of Staff | Office of Rep. David Valadao (R-CA) | As Chief of Staff to the Chair of the Republican Governance Group and Member of the House Committee on Appropriations, Mr. Renteria can speak to the funding priorities of the committee around the areas of agriculture and national defense, and how Congress can approach those issues in a common-sense, bipartisan fashion. |
| Hannah | Spengler | Chief of Staff | Office of Rep. Don Davis (D-NC) | As Chief of Staff to a Member of the House Armed Services Committee, Ms. Spengler can speak to military cooperation between the American and Mexican governments. |
| Deena | Tauster | Chief of Staff | Office of Rep. Andrew Garbarino (R-NY) | As Chief of Staff to a Member of the House Committee on Finance and the House Committee on Homeland Security, Ms. Tauster can share her perspective on preventing funding schemes for criminal enterprises. |
| Jeremy | Tittle | Chief of Staff | Office of Rep. Salud Carbajal (D-CA) | As Chief of Staff to a Member of the House Committee on Transportation and Infrastructure, Mr. Tittle can speak to the importance of trade as it relates to automotive manufacturing. |

12. Sponsor's interest in the subject matter and role in organizing the trip:

Center Forward's International Chiefs of Staff Issues Conference is being convened to bring together a bipartisan group of pragmatic staff and influencers from various industries and organizations to focus on common-sense solutions. Center Forward's organizational mission is to provide centrists with the information they need to craft common-sense solutions and provide support in turning those ideas into results. Center Forward brings together Members of Congress, not-for-profits, academic experts, trade associations, corporations, and unions to find common ground.

Center Forward is the sole organizer of the trip. Center Forward is planning the conference and is responsible for the organization and execution of the event logistics as well as the programming content. Discussion topics will include trade and foreign direct investment, manufacturing and tech innovation, AI, data privacy, and the strengthening of economic ties between the two countries' governments and business communities. Participants are expected to include congressional staff and advocate groups as well as business leaders and academic researchers.

15. b.2) Provide the reason for selecting the location of the event or trip:

Mexico City was selected for this trip to provide U.S. lawmakers, policymakers, and business leaders with an opportunity to engage with Mexican and American businesses and political leaders on issues affecting both the American and Mexican economies. As the two countries remain deeply intertwined and each has undergone significant political shifts, Mexico continues to be a major business hub with many major U.S. companies setting up headquarters in the country. This small, bipartisan delegation will focus on finding ways to increase shared economic growth and prosperity while attaining a greater understanding of how Mexican leaders are addressing the challenges facing their nation. This visit will develop dynamic domestic and international programming to continue building the vital relationship that already exists between the two countries.

C E N T E R
FORWARD

15 YEAR ANNIVERSARY

Center Forward International Chiefs of Staff Conference
Mexico City, Mexico — February 17 - 21, 2025
Conference Agenda

Center Forward Contact Information

Ryan McAlpin | (585) 857-1921 | ryan@center-forward.org
Riley Kilburg | (563) 542-6821 | riley@center-forward.org
Daniel Garza | (770) 827-0242 | daniel@center-forward.org
Ciara Nolan | (248) 212-4173 | ciara@center-forward.org

Monday, February 17, 2025

- 5:45 pm ET** Staff departs Washington Dulles International Airport (IAD)
United Airlines Flight 1566 | 5 h 5 min flight time
- 9:50 pm CT** Staff arrives at Benito Juárez Mexico City International Airport
(MEX)
- After collecting your luggage and clearing customs, you will walk into the Terminal 2 Arrival Hall. Center Forward staff and driver will be waiting to greet you with a card noting "Center Forward" at the barrier which you will see immediately as you walk into the Arrivals Hall. After everyone has gathered, the driver will depart the airport.*
- 10:10 pm - 10:40 pm** Depart Mexico City International Airport en route to InterContinental
Presidente Mexico City Hotel via shuttle (30 min.)
- Campos Elíseos 218, Polanco, Col. Chapultepec Polanco, Miguel
Hidalgo, 11560 Ciudad de México, CDMX, Mexico
- 10:40 pm** Check-in at the InterContinental Presidente Mexico City Hotel

Tuesday, February 18, 2025

BREAKFAST ON YOUR OWN

Continental breakfast is available in Club Room from 6:30 am - 11:00 am

Happy hour and appetizers are available from 6:00 pm to 8:00 pm.

****Located in the Club Lounge****

*****Business Casual attire. Please bring a government ID.***

- 7:30 am** Attendees meet in the hotel lobby
- 7:45 am - 8:45 am** Depart InterContinental Presidente Mexico City Hotel en route to 3M Innovation Center via shuttle (60 min.) In transit, a member of the Center Forward team will brief conference participants with a detailed overview of 3M's history and its evolution as a company. This briefing will explore 3M's origins to its transformation into a global leader in innovation. Participants will learn about the core principles that guide 3M's approach to problem-solving and product development, emphasizing its commitment to science, sustainability, and customer-centric solutions.
- 3M Innovation Center | Av. Santa Fe #190, Col. Santa Fe, Del. Cuajimalpa, 01210, Mexico City
- 8:45 am - 9:30 am** Welcome Remarks & Roundtable — Innovation Shaping Everyday Life
- Predro Casas, Vice President & General Manager, AmCham Mexico
 - Fernanda Guarro, President and Managing Director, 3M Mexico
 - Adriana Rius, Mexico, Latin American and Canada Brand & Communications, 3M
 - Larry Rubin, President, American Society
 - Guillermo Vogel, Co-Chair Mexico Side, CCE / US-Mex CEO Dialogue
- Conference participants will join 3M leadership for an insightful roundtable discussion exploring the company's innovative practices, groundbreaking research, cutting-edge technologies, and everyday products that shape and enhance various aspects of our lives.*
- 9:30 am - 10:15 am** Tour 3M Innovation Center

10:15 am - 11:15 am Depart 3M Innovation Center en route to the U.S. Embassy via shuttle (60 mins). In transit, a member of the Center Forward team will brief conference participants on the latest security posture between the United States and Mexico.

Embassy of the United States — Mexico | Av. P.º de la Reforma 305, Cuauhtémoc, 06500 Ciudad de México, CDMX, Mexico

Conference participants will complete a security check-in upon arrival.

This discussion will include a review of the coverage and outcomes of ratifying the USMCA as well as a detailed introduction of pressing issues related to the two countries' economies. Topics will include international trade, healthcare, immigration, manufacturing, agriculture, and current events in Mexico.

11:15 am - 12:15 pm Briefing from United States Embassy Officials on the current political and cultural aspects of the U.S.-Mexico relationship

- Hon. Ron Johnson, U.S. Ambassador-designate to Mexico, U.S. Embassy in Mexico
- Hon. Mark Coolidge Johnson, Deputy Chief of Mission, U.S. Embassy in Mexico

Representatives from the United States Embassy in Mexico will brief Issues Conference participants on the history of the U.S.-Mexico relationship, the values that bind the two, and the business partnership the two countries have relied upon for decades.

12:15 pm - 12:20 pm Depart U.S. Embassy en route for lunch at the American Chamber of Commerce Mexico via walking (5 min).

American Chamber of Commerce Mexico | Av. Paseo de la Reforma 295, Floor 3, Cuauhtémoc, 06500, Mexico City

12:20 pm - 1:30 pm Lunch — United States Business Investment in Mexico Outlook

- Pedro Casas Alatríste, Executive Vice President and General Director, American Chamber – Mexico
- María José Barragán, Chief of Staff, American Chamber – Mexico

Senior staff from the American Chamber Mexico will share their thoughts and perspectives on the challenges and opportunities facing

the two economies. Specifically, they will discuss the United States business investment in Mexico and how to design public policies and partnerships to create economic growth, boost competitiveness, spark innovation, and generate increased employment and higher wages in Mexico.

1:30 pm - 2:00 pm

Depart American Chamber of Commerce Mexico en route to Constellation Brands via shuttle (30 min).

Industrial Club | JW Marriott Hotel Mexico City, Andres Bello 29, Polanco

2:00 pm - 2:15 pm

Welcome Remarks

- Bernando Martinez, Vice President of Corporate Affairs, Constellation Brands

2:15 pm - 3:00 pm

Panel Discussion | USMCA, China, and How To Navigate Changing Trade Dynamics

- Bernando Martinez, Vice President of Corporate Affairs, Constellation Brands
- Nicole Vasilaros, Advisory Board Member, Center Forward

Conference participants will join members of the Constellation Brands team for an in-depth discussion on how businesses are addressing key trade challenges in today's dynamic environment. Topics will include the impact of the USMCA on companies with bilateral business models, its effects on workers, and the implications of tariffs and U.S. border policies on business operations.

The conversation will also explore the growing influence of China in the Mexican market, the challenges it poses, and strategies companies are implementing to reduce reliance on Chinese supply chains.

3:00 pm - 3:30 pm

Meet & Greet with Panelist

3:30 pm - 3:35 pm

Depart Constellation Brands en route to InterContinental Presidente via walking (5 min).

3:35 pm - 4:15 pm

Break

4:15 pm - 4:30 pm

Depart InterContinental Presidente Mexico City Hotel en route to Museo Nacional de Antropología via shuttle (15 min).

Museo Nacional de Antropología | Av. P.º de la Reforma s/n,
Polanco, Bosque de Chapultepec I Secc, Miguel Hidalgo, 11560
Ciudad de México, CDMX, Mexico

4:30 pm - 6:00 pm

Overview and tour of Mexican History at *Museo Nacional de Antropología* followed by a brief roundtable and welcome reception

- The Hon. Cynthia López Castro, Senator, Senate of the Republic (Mexico)
- Enrique Perret, Director, U.S.-Mexico Foundation (USMF)

Issues conference participants will tour the Museo Nacional de Antropología/Museo Tamayo Arte Contemporáneo to learn the history and culture of the Mexican people followed by remarks from Enrique Perret. Mr. Perret will speak to the importance of promoting history and culture to inform a shared story of migration, peace, and education. USMF works every day to promote and support education, leadership, and workforce development in Mexico and the United States through philanthropic efforts. Recognizing the inextricable link between Mexico and the United States, the U.S.-Mexico Foundation (USMF) partners with American businesses, non-profits, and political leaders to develop channels of cooperation and understanding.

6:00 pm

Official programming concludes for the day.

DINNER ON YOUR OWN

Wednesday, February 19, 2025

BREAKFAST ON YOUR OWN

Continental breakfast is available in Club Room from 6:30 am - 11:00 am

Happy hour and appetizers are available from 6:00 pm to 8:00 pm.

****Located in the Club Lounge****

****Business casual attire for the day. Government ID required.**

9:10 am - 9:30 am Depart InterContinental Presidente Mexico City Hotel en route to Meta via shuttle (20 min). In transit, a member of the Center Forward team will brief conference participants on the current AI technologies Meta employs and how that impacts the global market.

Meta | Pedregal 24, Col. Molino del Rey, Floors 18 and 21
Del. Miguel Hidalgo - México, D.F. 11040.

9:30 am - 9:45 am Welcome Remarks

- Iñigo Fernandez, Public Policy Director for Mexico, Central America, and the Caribbean, Meta

9:45 am - 11:15 am Roundtable Presentation | The Economic & Social Impact of AI In Mexico

- Iñigo Fernandez, Public Policy Director for Mexico, Central America, and the Caribbean, Meta
- Manuel Haces, Public Policy Manager, Meta
- Deborah Galindo, Public Policy Manager, Meta
- Arantxa Guillen, Policy Campaigns and Programs Manager, Meta
- Glenda Michel, Public Policy Manager, Academic and NGO Outreach, Meta

During the visit to Meta's Mexico City office, Iñigo Fernandez, Public Policy Director for Mexico, Central America, and the Caribbean at Meta, will lead a discussion about how the company's investments and programs are achieving economic impact for small and medium businesses and creators in Mexico and Central America, spurring development and innovation in the region. Participants will be able to demo Meta's latest technologies and experiences and hear how open-source AI and Llama are creating social and economic value in Mexico.

- 11:15 am - 11:30 am** Break
- 11:30 am - 11:45 am** Depart Meta en route to The Room Polanco via shuttle (15 min). In transit, a member of the Center Forward team will provide conference participants with an update on Mexico's new administration and the potential for evolving dynamics of the U.S.-Mexico relationship over the coming years and the implications for businesses and trade.
- The Room Polanco | Homero S/N. Int. 3, Mezzanine 5. Col, Polanco, Polanco I Secc, 11510 Ciudad de México
- 11:45 am - 1:00 pm** Lunch Remarks - Secretary of Economy
- The Hon. Marcelo Ebrard, Secretary of Economy, Mexican Government
- Over lunch, the Hon. Marcelo Ebrard, Secretary of Economy for the Mexican government, will brief conference participants on the economic priorities of the Sheinbaum Administration, and how they view the economic relationship with the United States and more broadly, with North America.*
- 1:00 pm - 1:20 pm** Depart The Room Polanco en route to General Motors via shuttle (20 min).
- General Motors | Avenida Ejército Nacional 843-B, 15th Floor, CDMX, México 11520
- 1:20 pm - 1:45 pm** Welcome Remarks & Product Showcase - Working Together: Allyshoring in North America
- Monica Del Carmen Garcia Rodriguez, Director, Global Purchasing and Supply Chain, GM Mexico
- During this visit, participants will have unique access to GM and GM Mexico leaders and delve into the company's strategic approach to building North American value chains with a focus on scalability, resilience, sustainability, and cost-competitiveness. Participants will have the opportunity to discuss policy considerations for both the U.S. and Mexico and how it impacts one of the most critical industries and drivers for jobs and investment in the region. This visit will revolve around collaborative efforts to address geopolitical and industrial challenges, and working together to build a more resilient, sustainable, and competitive automotive industry in North America.*

- 1:45 pm - 1:50 pm** Welcome Remarks
- Francisco Garza, President, GM Mexico
- 1:50 pm - 2:30 pm** Roundtable Discussion — Strengthening Auto Value Chains in North America
- Monica Del Carmen Garcia Rodriguez, Director, Global Purchasing and Supply Chain, GM Mexico
 - Amanda Farrell, Counsel, Legal Affairs and Trade, GM
 - Jasper Jung, Executive Director, Strategic Initiatives, Global Public Policy, GM
- Leaders from GM and GM Mexico will provide an overview of the company's resilience strategy. During this panel, participants will learn how near-shoring and ally-shoring strategies along with commercial and policy considerations in both the U.S. and Mexico are critical to building strategic alliances for mutual economic benefits.*
- 2:30 pm - 3:00 pm** Meet and Greet with GM and GM Mexico Executive Leadership
- Conference participants will join GM and GM Mexico at the GMM HQ Terrace for informal, forward-looking conversations on GM and ally-shoring, as well as other topics such as emerging trends in the auto industry. Conference participants will have the opportunity to dive deeper into a range of business and policy topics and build on the discussions around how we work together to strengthen jobs, drive investment, and protect North America's manufacturing and technology leadership.*
- 3:00 pm - 3:20 pm** Depart General Motors en route to the InterContinental Presidente (20 min).
- 3:20 pm - 5:30 pm** Break
- 5:30 pm - 6:30 pm** Guided Debrief
- Riley Kilburg, Executive Director, Center Forward
- Conference attendees will gather in the InterContinental Presidente Hotel for a casual discussion on the day's events, and what lessons they learned that can be taken back to Congress.*

6:30 pm - 6:45 pm Depart the InterContinental President Hotel en route to dinner via walking (15 min).

Saks Polanco | 11560 Campos Eliseos, Lamartine 133, Chapultepec Morales, esq, 11560 Ciudad de México, CDMX, Mexico

6:45 pm - 8:45 pm Dinner — The Digital Transformation

- Ana Paola Barbosa, Director for Public Policy Mexico, Amazon Web Services
- Jennifer Prescott, Director of International Trade & Tax and Latin America Public Policy, Amazon Web Services

Over an engaging policy dinner conversation, conference participants will learn about the ongoing digital transformation in Mexico and its implications for businesses. This discussion will delve into the impact of energy policies and reforms on technological innovation, economic growth, and regional trade under the USMCA framework. Attendees will gain insights into how digitalization and energy strategies are shaping Mexico's business landscape and fostering cross-border collaboration.

8:45 pm - 9:00 pm Depart Saks Polanco en route to the InterContinental President via walking (15min).

9:00 pm Official programming concludes for the day.

Thursday, February 20, 2025

Continental breakfast is available in Club Room from 6:30 am - 11:00 am

Happy hour and appetizers are available from 6:00 pm to 8:00 pm.

Located in the Club Lounge

****Business attire for the day. Please bring a photo I.D. with you.**

8:25 am - 9:00 am Depart InterContinental Presidente Mexico City Hotel en route to Department of Foreign Affairs | Secretariat of Foreign Affairs via shuttle (35 min.) In transit, a member of the Center Forward team will brief conference participants on the state of the diplomatic relationship between the U.S. and Mexico.

Department of Foreign Affairs | Av. Juarez 20, Colonia Centro, Centro, Cuauhtémoc, 06010 Ciudad de México, CDMX, Mexico

9:00 am - 10:15 am Remarks — U.S.-Mexican Working Relations
Department of Foreign Affairs | Secretariat of Foreign Affairs

The Hon. Roberto Velasco, Undersecretary of Foreign Affairs, Mexico

In his remarks on U.S.-Mexican working relations, Undersecretary Roberto Velasco will highlight the imperative of fostering strong collaboration between the two nations. Emphasizing diplomatic ties and shared goals, he will underscore the importance of cooperative efforts to address common challenges and enhance mutual success, showcasing a commitment to building a resilient and beneficial partnership.

10:15 am - 10:45 am Depart the Department of Foreign Affairs en route to Walmart via shuttle (30 min.)

Walmart | Av. Rodolfo Gaona 647, Periodista, Miguel Hidalgo, 11220 Ciudad de México, CDMX, Mexico

10:45 am - 11:15 am Welcome Introduction & Facility Tour

- Javier Treviño, Senior Vice President of Corporate Affairs, Walmart

Conference participants will tour the Toreo Walmart Supercenter, learning firsthand about the supercenter format and the Walmex strategy, including key verticals such as BAIT, the mobile virtual network operator used and Cashi, the digital wallet offered to unbanked and underbanked customers.

11:00 am - 12:15 pm Panel Discussion —

- Beto Gutierrez, Deputy Director, Policy Lab, Walmart
- Rodrigo Flores, Director of Government Relations, Walmart
- Javier Treviño, Senior Vice President of Corporate Affairs, Walmart
- Manolo Reynaud, Director of Policy & Sustainability, Walmart

Through a wide ranging conversation led by senior Walmart executives, conference participants will learn about the key issues facing Walmart in Mexico, including the impact of U.S.-Mexico relations.

12:15 pm - 12:30 pm Depart Walmart en route to Mochomos via shuttle (15 min)

Mochomos | v. Paseo de las Palmas 781, Lomas de Chapultepec, Miguel Hidalgo, 11560 Ciudad de México, CDMX

12:30 pm - 2:15 pm Lunch — Mochomos

- Itzel Paniagua, Chef

Itzel Paniagua, Runner-Up of MasterChef México Season 6, will lead conference participants in a culinary lesson, showcasing local cuisine and the importance of farming in the Mexican economy.

2:15 pm - 2:35 pm Depart the Mochomos via shuttle en route to InterContinental Presidente Mexico City Hotel (20 min).

2:35 pm - 4:00 pm Break

4:00 pm - 4:30 pm Depart InterContinental Presidente Mexico City Hotel en route to Hotel Maison via shuttle (30 min.)

Hotel Maison — Conchita Clamont Restaurant | Valladolid 96, Roma Nte., Cuauhtémoc, 06700 Ciudad de México, CDMX, Mexico

4:30 pm - 6:00 pm Remarks — Insights into Mexican Agriculture

- Carlos Crain L. Corcuera, Global Brand Ambassador, Volcán de mi Tierra

Conference participants will engage in meaningful conversation about the region's agricultural practices, the challenges faced by local producers, and the innovative approaches driving sustainable growth. This unique experience offers an opportunity to connect with local traditions while gaining a deeper understanding of the intersection between culture, agriculture, and global impact.

6:00 pm - 6:30 pm

Depart Hotel Maison en route to La Taberna via shuttle (30 min.)

La Taberna | Calle Gral. Prim 34, Juárez, Cuauhtémoc, 06600 Ciudad de México, CDMX, Mexico

6:30 pm - 8:30 pm

Dinner —Bipartisanship On A Global Stage

- Riley Kilburg, Executive Director, Center Forward

Riley Kilburg, Executive Director of Center Forward, will lead conference participants in a conversation reflecting on their experiences in Mexico. The conversation will explore insights gained and perspectives on fostering bipartisanship solutions in a global context.

8:30 pm - 8:45 pm

Depart La Taberna en route to the InterContinental Presidente via shuttle (15 min).

9:00 pm

Official programming concludes for the day.

Friday, February 21, 2025

BREAKFAST ON YOUR OWN

Continental breakfast is available in Club Room from 6:30 am - 11:00 am

****Located in the Club Lounge****

- 6:50 am - 7:40 am** Staff depart Presidente InterContinental Benito Juarez Mexico City International Airport (MEX) via shuttle (30 min).
- 7:40 am - 8:10 am** Staff complete security and check-in
- 9:40 am** Members and staff depart Benito Juarez Mexico City International Airport (MEX)
- United Airlines Flight 1567 | 4 h 15 min flight time
- 2:55 pm** Arrive at Washington Dulles International Airport (IAD)

The first part of the document discusses the importance of maintaining accurate records of all transactions. It emphasizes that every entry should be supported by a valid receipt or invoice. This not only helps in tracking expenses but also ensures compliance with tax regulations. The second part of the document provides a detailed breakdown of the company's financial performance over the last quarter. It includes a comparison of actual results against budgeted figures, highlighting areas of both strength and concern. The final section outlines the company's strategic goals for the upcoming year, focusing on increasing operational efficiency and expanding market reach.

In addition to the financial data, the report also covers key operational metrics. These include production volumes, quality control statistics, and customer satisfaction scores. The analysis shows that while production has remained stable, there has been a noticeable increase in customer complaints regarding delivery times. This suggests a need for improved logistics management. Furthermore, the report notes that the company's R&D efforts have yielded several promising new product prototypes, which could significantly enhance the company's competitive advantage in the long run.

The management team is committed to addressing the challenges identified in the report and is confident that the proposed strategies will lead to sustained growth and profitability. Regular communication and collaboration between all departments are essential for the successful implementation of these plans. The report concludes with a call to action, urging all employees to stay focused on their respective roles and contribute to the overall success of the organization. The next meeting will be held on the 15th of the month to discuss the progress of the various initiatives.

For more information or to request a copy of this report, please contact the Finance Department at (010) 123-4567. We appreciate your interest in our company's performance and look forward to your continued support.