

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: Sophie Toya
2. a. Name of Accompanying Relative: _____ **OR** None
b. Relationship to Traveler: Spouse Child Other (specify): _____
3. a. Dates: Departure: 4/7/2026 Return: 4/10/2026
b. Dates at Personal Expense, if any: _____ **OR** None
4. Departure City: Washington, DC Destination: New York City Return City: Washington, DC
5. Sponsor(s), Who Paid for the Trip: Center Forward
6. Describe Meetings and Events Attended: Attended a variety of financial institutions to participate in discussions about related topics, including financial fraud, digital assets, capital markets, cybercrime, and credit cards.
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: *Sophie Toya* Date: 4/20/2026

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: French Hill Date: 4/20/2026

Signature of Supervising Member: *J. French Hill*

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): New York City, New York

3. Date of Departure: 04/07/2026 Date of Return: 04/10/2026

4. Name(s) of Traveler(s): Sophie Toya, Levon Bagramian, Zach Gates


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	\$730.18	\$900.00	\$231.05	\$0.00
Accompanying Family Member	N/A	N/A	N/A	N/A

6. All expenses connected to the trip were for actual costs incurred and not a *per diem* or lump sum payment. *Signify statement is true by checking box.*

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

Signature:  Date: 04/15/2026

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.

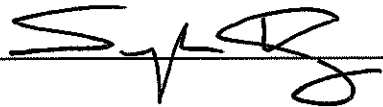
This form and any attachments may be submitted at 1015 Longworth House Office Building or travel.requests@mail.house.gov.

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: Sophie Toya

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): House Committee on Financial Services, Majority

Office Address: 2129 Rayburn House Office Building Washington, DC 20515

Telephone Number: 2022257502

Email Address of Contact Person: sophie.toya@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: Sophie Toya
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: New York City, New York
4. a. Date of Departure: April 7, 2026 Date of Return: April 10, 2026
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 Member Services Coordinator for the House Committee on Financial Services, this trip will provide valuable insights into impacts of our policy and goals onto the financial system. A Member Services role requires knowledge about all aspects of the financial services world, and the range of topics on the itinerary will supplement my knowledge necessary to excel for our members.
9. Yes No Is the traveler aware of any registered federal lobbyists or foreign agents involved in **planning, organizing, requesting, or arranging the trip?**
10. For staff travelers, to be completed by your employing Member:

ADVANCED AUTHORIZATION OF EMPLOYEE TRAVEL

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

Signature of Employing Member:  Date: 3/6/2026

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 Supplemental Form.

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

6. Date of Departure: April 7, 2026 Date of Return: April 10, 2026

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

b. Destination(s): New York City, New York

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

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

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

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

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 attached Supplemental Form.
-
-

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): \$92 per full programming day and \$69 per travel days.
 - 2) Provide the reason for selecting the location of the event or trip: _____
Please see attached Supplemental Form.
-

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

Hotel Name: PUBLIC Hotel City: New York City Cost Per Night: \$300
 Reason(s) for Selecting: Please see attached Supplemental Form.

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	\$819.15 Train + Shuttle	\$900.00	\$252.50
For each Accompanying Family Member	N/A	N/A	N/A

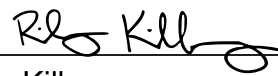
	Other Expenses (dollar amount per item)	Identify Specific Nature of "Other" Expenses (e.g., taxi, parking, registration fee, etc.)
For each Member, Officer, or Employee	\$0.00	N/A
For each Accompanying Family Member	N/A	N/A

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: February 25, 2026
 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.

Private Sponsor Travel Certification Form: Supplemental Form

First	Last	Title	Affiliation	Reason
Quincy	Henderson	Financial Services Counsel	Office of Representative Ritchie Torres	As Financial Services Counsel for a New York Representative, Mr. Henderson can speak about how the financial system can impact the local New York community and how legislative policy can be used in tandem with private industry to drive value for everyday consumers.
Sheridan	O'Kelly	Legislative Assistant	Office of Representative Sean Casten	As the Legislative Assistant to a member on the Financial Services Committee, Ms. O'Kelly will provide valuable insights on how policy is crafted to grow the financial industry while ensuring its stability. Specifically, she would be able to discuss the importance of capital markets and financial institutions for working Americans.
Erin	Butler	Legislative Assistant	Office of Representative Jim Himes	As the Legislative Assistant to a member on the Financial Services Committee, Ms. Butler can provide valuable insights on how financial policy needs to balance financial stability with growth promotion. She can also discuss how financial institutions impact the lives of working Americans and diverse constituents.
Jaliya	Nagahawatte	Legislative Assistant	Office of Representative Young Kim	As the Legislative Assistant to a member on the Financial Services Committee's Financial Institutions Subcommittee, Mr. Nagahawatte can provide valuable insights on how policy is crafted to grow the financial industry while ensuring its stability. He can also address the interconnectedness of financial institutions and the U.S. government.

Tammy	Pham	Legislative Director	Office of Representative Sylvia Garcia	As the Legislative Director to a member on the Financial Services Committee's Housing and Insurance Subcommittee and Digital Assets, Financial Technology, and Artificial Intelligence Subcommittee, Ms. Pham can provide valuable insights on how financial policy and the financial industry can encourage home ownership. In addition, she can discuss how new technologies are disrupting the financial industry and the benefits and costs of this disruption.
Evan	Ashy	Deputy Chief of Staff and Legislative Director	Office of Representative Cleo Fields	As the Deputy Chief of Staff and Legislative Director to a Member on the Financial Services Committee's Capital Markets Subcommittee and Financial Institutions Subcommittee, Mr. Ashy can talk through the ways that policy affects U.S. public capital markets and impacts the business operations of important financial institutions. In addition, he can discuss how thoughtful policy can be crafted to ensure Americans benefit from these markets and institutions.
JR	Schroeder	Legislative Director	Office of Representative William Timmons	As the Legislative Director to a Member on the Financial Services Committee's Capital Markets Subcommittee, Financial Institutions Subcommittee, and Digital Assets, Financial Technology, and Artificial Intelligence Subcommittee, Mr. Schroeder can talk to the ways that new technologies are disrupting financial structures in the U.S. Additionally, he can discuss ways in which policy can both benefit and harm the development and implementation of this technology.

Caroline	Sayers	Senior Policy Advisor	Office of Representative Zach Nunn	As the Senior Policy Advisor to a Member on the Financial Services Committee's Capital Markets Subcommittee, Digital Assets, Financial Technology, and Artificial Intelligence Subcommittee, and National Security, Illicit Finance, and International Financial Institutions Subcommittee, Ms. Sayers can discuss how financial crime harms Americans and how policy solutions intertwined with initiatives from players in the financial industry can combat this crime. She can also talk to the ways that U.S. debt and equity markets have changed in the past decades and how these markets might adapt to new financial technologies.
Curt	Bliamptis	Senior Policy Advisor	Office of Representative Mike Flood	As the Senior Policy Advisor to a Member on the Financial Services Committee's Financial Institutions Subcommittee and Housing and Insurance Subcommittee, Mr. Bliamptis can provide valuable insights into the U.S. housing crisis and how banking institutions and other financial firms can aid in this crisis. He can also talk to the intersection of the U.S. financial system and affordable housing in the U.S.

Charles	Dahan	Legislative Director	Office of Representative Lisa McClain	As the Legislative Director to a Member on the Financial Services Committee's Capital Markets Subcommittee and National Security, Illicit Finance, and International Financial Institutions Subcommittee, Mr. Dahan can discuss how U.S. capital markets provide avenues for wealth creation in the U.S. and how federal policy can further promote wealth creation. Additionally, Mr. Dahan can talk to the ways that financial crime has evolved over the preceding decades and ways that private industry in partnership with the federal government can combat this growing issue.
Kellie	O'Brien	Legislative Assistant	Office of Representative Sam Liccardo	As the Legislative Assistant to a Member on the Financial Services Committee's Digital Assets, Financial Technology, and Artificial Intelligence Subcommittee and National Security, Illicit Finance, and International Financial Institutions Subcommittee, Ms. O'Brien can talk to the ways new disruptive technologies and digital assets are transforming investing and banking in the U.S.
Brooke	Kramer	Legislative Director	Office of Representative Frank Lucas	As the Legislative Director to a Member on the Financial Services Committee's Capital Markets Subcommittee and National Security, Illicit Finance, and International Financial Institutions Subcommittee, Ms. Kramer can provide valuable insights into how U.S. capital markets are transforming and how public capital markets affect the financial well-being of Americans. She can also talk about how the financial system affects U.S. national security and ways to strengthen national security through well-crafted financial policy.

Ivan	Torrez	Legislative Assistant	Office of Representative Vicente Gonzalez	As the Legislative Assistant to a Member on the Financial Services Committee's Capital Markets Subcommittee and National Security, Illicit Finance, and International Financial Institutions Subcommittee, Mr. Torrez can provide valuable insights into the ways the debt and equity markets are adapting to the 21st century and how these changes may affect constituents and working Americans. Additionally, he can talk to the ramifications of financial crime and ways policymakers can work with financial institutions to address this growing issue.
Paul	Balzano	Senior Professional Staff Member	U.S. House Committee on Agriculture	As a Senior Professional Staff Member for the Agriculture Committee's Commodity Markets, Digital Assets, and Rural Development Subcommittee, Mr. Balzano can talk to the importance of commodity markets in the U.S. economy and how a well functioning commodity market can provide innumerable benefits to American farmers. He can also talk to the proper classification of digital assets and how a proper jurisdictional split between the SEC and CFTC can strengthen this emerging asset class.
Alex	Ndikum	Deputy Chief of Staff	Office of Representative Emanuel Cleaver	As Deputy Chief of Staff to a Member on the Financial Services Committee's Housing and Insurance Subcommittee and Capital Markets Subcommittee, Mr. Ndikum can provide valuable insights into how federal housing policy and partnerships with the U.S. financial system can promote homeownership. He can also discuss the importance of insurance markets in the U.S. economy.

Amber	Nejjari	Legislative Assistant	Office of Representative John Rutherford	<p>As Senior Policy Advisor for a Member on the Appropriations Committee's Transportation, Housing and Urban Development, and Related Agencies Subcommittee, Ms. Nejjari can talk to how the federal government funds transportation and housing programs that benefit constituents and contributes to U.S. economic output. Additionally, she can discuss the potential for partnerships between the federal government and the U.S. financial industry that could provide outsized benefits to American workers and consumers while strengthening U.S. economic infrastructure.</p>
Lucas	Lam	Legislative Director	Office of Representative Janelle Bynum	<p>As the Legislative Director to a Member on the Financial Services Committee's Housing and Insurance Subcommittee and Capital Markets Subcommittee, Mr. Lam can provide valuable insights into how financial policy affects homeownership in the U.S. and how unique policy solutions provide Americans with affordable homes. He can also discuss ways that public debt and equity markets can provide avenues to wealth accumulation for constituents and capital to innovative American entrepreneurs.</p>

Eric	Mendoza	Deputy Chief of Staff and Legislative Director	Office of Representative Monica De La Cruz	As the Deputy Chief of Staff and Legislative Director to a Member on the Financial Services Committee's Housing and Insurance Subcommittee and Financial Institutions Subcommittee, Mr. Mendoza can discuss how policymakers can partner with financial institutions to provide more affordable pathways to homeownership for all Americans and strengthen the U.S. insurance industry for impending challenges this century. He can also talk to the ways the U.S. banking industry is adapting to an increasingly digital age and how banking policy can be crafted to benefit all Americans.
Elizabeth	Walters	Deputy Chief of Staff and Legislative Director	Office of Representative Dusty Johnson	As the Deputy Chief of Staff and Legislative Director for a Member on the Agriculture Committee's Commodity Markets, Digital Assets, and Rural Development Subcommittee, Ms. Walters can discuss the ways policymakers can partner with financial institutions to address the scarcity of capital in rural America. She can also discuss how digital assets will transform the U.S. financial system and affect a wide array of constituents.
Maryana	Sawaged	Senior Policy Advisor	Office of Representative Pete Aguilar	As Senior Policy Advisor for a Member on the Appropriations Committee's Transportation, Housing and Urban Development, and Related Agencies Subcommittee, Ms. Sawaged can discuss how these vital agencies and their related programs affect the U.S. economy and contribute to economic growth. She can also talk to the ways the financial system works in tandem with Department of Housing and Urban Development and how the government can utilize the financial industry to benefit working Americans.

Michael	Rivas	Legislative Assistant	Office of Representative Juan Vargas	<p>As the Legislative Assistant to a Member on the Financial Services Committee's Capital Markets Subcommittee, Financial Institutions Subcommittee, and National Security, Illicit Finance, and International Financial Institutions Subcommittee, Mr. Rivas can provide valuable insights into how the banking industry can help foster well functioning public capital markets and how both capital markets and the banking industry provide pathways to prosperity for all Americans. He can also discuss how strengthening our financial institutions provides a bulwark for our national security apparatus and how financial policy can be utilized to promote global policy objectives that protect Americans at home.</p>
Brent	Katz	Legislative Assistant	Office of Representative Thomas Suozzi	<p>As the Legislative Assistant to a Member on the Ways and Means Committee's Tax Subcommittee, Mr. Katz can elaborate on how the U.S. tax code affects the U.S. financial system and how the financial taxation can leverage financial institutions to provide wealth for working Americans. Additionally, as the Legislative Assistant for a New York Representative, he can discuss the impacts of the financial system on the local economy and how U.S. financial policy can empower local small businesses and New York constituents.</p>

Jack	Solowey	Counsel	U.S. House Committee on Financial Services	As Counsel to the Financial Services Committee's Digital Assets, Financial Technology, and Artificial Intelligence Subcommittee, Mr. Solowey can discuss the impact of the new digital asset class on investing in the U.S. Additionally, he can discuss ways that public capital markets are adapting to disruptive technologies transforming the U.S. financial system.
Petrina	Thomas	Member Services Director	U.S. House Committee on Financial Services	As Member Services Director for the House Committee on Financial Services, Ms. Thomas can discuss the different ways policymakers are balancing regulatory stability and innovation in the U.S. financial system. She can also talk to the different approaches policymakers take when enacting their policy goals.
Sophie	Toya	Member Services Coordinator	U.S. House Committee on Financial Services	As Member Services Coordinator for the House Committee on Financial Services, Ms. Toya can provide valuable insights into how policymakers approach problems in financial services and how impacts in the financial system affect the various constituents of House Financial Services Members.

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

Center Forward's Financial Services Innovation Conference is being convened to bring together a bipartisan group of senior legislative staff from the House of Representatives to discuss innovation and development in America's financial services systems, and how the federal government can foster growth and promote financial stability. Center Forward's organizational mission is to provide pragmatists 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, their staffs, 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 differences between commercial and retail banking, alternative asset products, the impact of insurance markets on the U.S. economy, payment systems, retirement accounts, infrastructure investments, financial crimes, cryptocurrencies and digital assets, disruption of AI on financial services, equity exchanges, financial news effects on investing decisions, international cooperation on the global financial system, critical financial infrastructure, credit fraud prevention, and how small businesses interact with the financial system. Conference attendees will be senior legislative staff from House member offices, the House Agriculture Committee, and the House Financial Services Committee, and will speak with financial practitioners, business leaders, researchers, small business owners, and government officials in New York City.

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

New York City, New York was selected as the location for the conference to give attendees an on the ground experience of America's financial center. New York City is the epicenter of America's capital markets and home to firms that are part of the creative disruption to the way the U.S. banks, pays for goods, and interacts with financial institutions broadly. New York City is home to the largest stock exchange in the world, the New York Stock Exchange and the headquarters of multiple investment, commercial, and retail banks. New York City is also the global financial capital city providing insights into how financial policy affects global markets and how developments in other nations can affect the U.S. financial system. Throughout the conference, attendees will see the inner workings of America's financial system and learn about how this impacts consumers and the constituents of their district.

16) Reasons for Selecting:

The PUBLIC Hotel New York was chosen due to its central location to many of the site visits and its proximity to the New York Stock Exchange. Additionally, the hotel offers rooms for conference programming and a complimentary breakfast option for participants at a competitive rate. Although the nightly rate is slightly above the GSA per diem rate for New York City in April, it is more affordable than other hotels with comparable accommodations and programming space.

Michael Guest, Mississippi
Chairman
Mark DeSaulnier, California
Ranking Member

Andrew R. Garbarino, New York
Ashley Hinson, Iowa
Nathaniel Moran, Texas
Brad Knott, North Carolina

Deborah K. Ross, North Carolina
Glenn F. Ivey, Maryland
Sylvia R. Garcia, Texas
Sahas Subramanyam, Virginia



ONE HUNDRED NINETEENTH CONGRESS

U.S. House of Representatives

COMMITTEE ON ETHICS

Thomas A. Rust
Staff Director and Chief Counsel

Jordan Downs
Chief of Staff to the Chairman

David Arrojo
Counsel to the Ranking Member

1015 Longworth House Office Building
Washington, D.C. 20515-6328
Telephone: (202) 225-7103
<https://Ethics.House.gov>

April 7, 2026

Ms. Sophie Toya
Committee on Financial Services
2129 Rayburn House Office Building
Washington, DC 20515

Dear Ms. Toya:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to New York, New York, scheduled for April 7 to 10, 2026, 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 \$525 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

Mark DeSaulnier
Ranking Member

MG/MD:rp