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: Andrew Grossman

2. a. Name of Accompanying Relative: _____ ***OR*** ☐ None
   b. Relationship to Traveler: ☐ Spouse ☐ Child ☐ Other (specify): _____

3. a. Dates: Departure: 10/14/26 Return: 10/16/26
   b. Dates at Personal Expense, if any: 10/14/26 ***OR*** ☐ None

4. Departure City: Washington DC Destination: New Orleans, LA Return City: Washington DC

5. Sponsor(s), Who Paid for the Trip: National Association of Charitable Gift Planners

6. Describe Meetings and Events Attended: Speaker: The Room Where It Happens: How U.S. Charitable Policy Gets Made; Attended sessions on: the donation of appreciated property; legacy charitable planning; and the charitable set-aside deduction.

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:** 10/26/26

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: The Hon. Richard E. Neal **Date:** 10/28/26

Signature of Supervising Member: _____

last updated 7/2023

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: National Association of Charitable Gift Planners
2. Travel Destination(s): New Orleans Marriott 555 Canal St. New Orleans, LA
3. Date of Departure: October 14, 2026 Date of Return: October 16, 2026
4. Name(s) of Traveler(s): Andrew Grossman
   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	$736.80	$530.00	$0.00	$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:** 10/22/2026

Name: Michael Kenyon **Title:** President and CEO

Organization: National Association of Charitable Gift Planners

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

Address: 1075 Broad Ripple Ave. #306, Indianapolis, IN 46220

Telephone: (317) 269-6274 **Email:** mkenyon@charitablegiftplanners.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.

last updated 7/2023

COMMITTEE ON ETHICS

TRAVELER FORM

1. Name of Traveler: Andrew Grossman

2. Sponsor(s) who will be paying or providing in-kind support for the trip: National Association of Charitable Gift Planners

3. City and State **OR** Foreign Country of Travel: New Orleans, Louisiana

4. a. Date of Departure: October 14, 2026 Date of Return: October 16, 2026

   b. Yes ☒ No ☐ Will you be extending the trip at your personal expense?

   If yes, list dates at personal expense: October 14, 2026

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:
   The invitation is to both speak at a conference, and attend the conference. The subject matter of the conference is actually quite useful for my professional work on the Committee; to attend the conference in full will require a two night stay.

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 serve as the Chief Tax Counsel for the Minority Staff on the Committee on Ways & Means. The conference is about charitable giving, and the tax code is of course of central importance in the context of charitable giving. The conference sponsors are hoping that I can enlighten them about the evolving views of charitable giving on Capitol Hill (especially in light of changes made in the OBBBA), and I am hoping that I can learn more about trends in tax planning

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:** 8/25/2026

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:
   National Association of Charitable Gift Planners (CGP)
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): Andrew Grossman
   Andrew is invited to present at the CGP national conference on the topic of how tax legislation evolves and policy decisions are made.
5. Yes ☐ No ☒ Is travel being offered to an accompanying family member of the House invitee(s)?
6. Date of Departure: 10/14/2026 Date of Return: 10/16/2026
7. a. City of departure: Washington DC
   b. Destination(s): New Orleans
   c. City of return: Washington DC
8. ***Check only one.*** I represent that
   a. ☐ The sponsor of the trip is an institution of higher education within the meaning of section 101 of the Higher Education Act of 1965; **OR**
   b. ☐ The sponsor of the trip does not retain or employ a registered federal lobbyist or foreign agent; **OR**
   c. ☒ The sponsor employs or retains a registered federal lobbyist or foreign agent, but the trip is for attendance at a one-day event *and* lobbyist / foreign agent involvement in planning, organizing, requesting, or arranging the trip was *de minimis* under the Committee's travel regulations.

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. The presentation is in the afternoon and airline schedules may not allow for a single night stay.

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:

CGP presents an annual conference on charitable gift planning. For attendees, tax policy and legislation are important factors in working with donors as representatives of charitable organizations. Understanding how tax legislation evolves and how policy is made help inform how gift planners can advocate for charitable gift planning. CGP is a nonprofit association, and the conference presents over 80 speakers in over 50 sessions over 3 days. CGP is solely responsible for the invitation, all planning and expenses related to Mr. Grossman's appearance at the conference. No external funds are used in relation to Mr. Grossman's appearance. The conference is the sole production of CGP and there are no other interests or entities engaged in the planning of the conference.

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: New Orleans Marriott City: New Orleans Cost Per Night: $265 + tax
   Reason(s) for Selecting: Conference hotel where all events are held and attendees and speakers are staying
   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:**

☐ Actual Amounts ☒ Good Faith Estimates	Total **Transportation** Expenses per Participant	Total **Lodging** Expenses per Participant	Total **Meal** Expenses per Participant
For each Member, Officer, or Employee	$736.80	$530	$100
For each Accompanying Family Member	0	0	0

	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	$950	Cost of Conference Registration fee which is waived for all guest presenters
For each Accompanying Family Member	0	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 anindividual 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: 08/24/2026

Name: Michael Kenyon Title: President and CEO

Organization: National Association of Charitable Gift Planners

Address: 1075 Broad Ripple Ave. #306

Email: mkenyon@charitablegiftplanners.org Telephone: 3172696274

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
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
Suhas 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

October 9, 2026

Mr. Andrew Grossman
Committee on Ways and Means
1129 Longworth House Office Building
Washington, DC 20515

Dear Mr. Grossman:

Pursuant to House Rule 25, clause 5(d)(2), the Committee on Ethics hereby approves your proposed trip to New Orleans, Louisiana, scheduled for October 14 to 16, 2026, sponsored by National Association of Charitable Gift Planners. We note that this trip includes one day at your personal expense. We remind you that, because the trip sponsor employs a federal lobbyist, you may participate in officially-connected activity on one calendar day only.

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:tn

NATIONAL ASSOCIATION of Charitable Gift Planners

Government Relations and Advocacy Session Open Panel Discussion

Presented by and financially supported by

National Association of Charitable Gift Planners (501c3)

Presentation during the CGP Conference 2026

New Orleans, LA

October 14-16, 2026

Conference Website

Mission Goals: This panel discussion aims to educate conference attendees about the legislative process, including how proposals gain support and move through the committee process to be introduced as bills for legislative consideration. Conference attendees will gain a clear understanding of the legislative process and insights into the various factors that impact it.

Relevance to Official Duties: As an active staffer, Mr. Grossman is an expert, and his sharing of knowledge will inform attendees and ensure they have an accurate understanding of the legislative process.

Location: The purpose of travel is to present at the CGP Conference 2026, a three-day educational conference for professionals engaged in charitable gift planning. No additional events or obligations are scheduled.

Wednesday, October 14: Travel

American Airlines 3126, Depart DCA 11:36 am, Arrive MSY 1:20 pm

Transport to New Orleans Marriott by taxi

Location: New Orleans Marriott, 555 Canal St. New Orleans, LA 70130

Thursday, October 15

7:30 am: Conference registration and breakfast

8:30 am: *Community Foundations Affinity Group*
Begin your day with our affinity group sessions focused on issues that affect your slice of the nonprofit sector. Facilitators will invite discussion on topics that may include constituent trends, public relations challenges, and the current tax and philanthropic environment, among others.

9:30 am: *Networking Break*
Stop by and visit our exhibitors, grab a cup of coffee and stop by the CGP Lounge to get involved and learn more about the organization.

10:00am: *Shades of Grey: When Can a Donor Make a Gift of Appreciated Property to Charity?*
For decades, Revenue Ruling 78-197 and applicable cases provided that a donor would not be taxed on that gain from the sale of donated property under the assignment of income doctrine if the donor was not legally bound to sell the property on the date of the gift. Hoensheid v. Commissioner, has eliminated this clear standard in most contexts, taxing gain on the sale of property to donor once the sale is virtually certain to occur—which could be before the donor is legally bound to sell the property. Presentation will explain the assignment of income doctrine, its history, and current cases. The presentation will give guidance on how to analyze gifts in the context of real estate sales, corporate transactions, and other situations to determine when it may be too late for a donor to complete a gift and avoid being taxed on the gain in the donated property.

11:30am: *Outlast the Legacy Gap: Spouses and Gen-X Successors*
By 2045, an estimated $84 trillion will transfer from Baby Boomers to spouses, heirs, and charities. While roughly $12 trillion is projected to benefit charitable causes, nearly $72 trillion will pass to successors—often first to surviving spouses, then to Gen X heirs. This historic shift raises a critical question: Are charities prepared for the next decision-makers? This transfer represents more than dollars changing hands. It includes complex assets—real estate, retirement accounts, closely held stock, and family businesses—each carrying unique opportunities and challenges for charitable gift planning. As control moves from original wealth creators to spouses and the next generation, donor motivations, giving priorities, and engagement expectations will inevitably evolve. Are your planned giving strategies inclusive of surviving spouses and successor influencers today? Do you understand how to engage beneficiaries of philanthropic conversations? Are you ready for

generational shifts in values, communication styles, and decision-making dynamics? This interactive session will equip you with practical, forward-looking strategies to navigate this transition. We'll explore demographic realities, the growing influence of women and Gen X donors, and relationship-centered approaches that build durable philanthropic partnerships across generations.

12:30pm: *Advocacy Update Plenary and Lunch: The Policy and Political Landscape for Charitable Gift Planners*

During this special presentation, Sandra will discuss current threats, implications, and opportunities for gift planners to navigate the evolving landscape of charitable giving policy. Uncover the potential impacts of proposed legislative changes and learn advocacy strategies, practical tools, and opportunities to join the growing influence of the National Association of Charitable Gift Planners in Washington to protect and advance charitable gift planning.

We will also recognize our award winners for Council of the Year, Rising Star and Distinguished Service Awards.

2:15 – 2:30 pm **Soundcheck**

Meet in presentation room (TBD) to meet moderator and test microphones and sound system

2:30 -2:45 pm Doors open for attendees to be seated

2:45pm: *The Room Where It Happens: How U.S. Charitable Policy Gets Made* ***(Panelist)***

Policy changes at the federal level stand to significantly impact charitable gift planning, yet it's not always clear how those changes are debated and ultimately made. During this policy session, a set of key advisors to the top Republican and Democrat on the House Ways and Means Committee, which has jurisdiction over the taxation of the charitable sector, will join us to shed light on how members of congress are thinking about the nonprofit sector. They will provide insight into how legislation evolves, how policy decisions are made, and how charitable organizations and professionals can effectively engage in the public policy process. If you care about the legislative landscape and how it can change charitable gift planning and donors' decision making, this is a conversation you won't want to miss.

4:15pm: *Let's Get Fiscal: The Charitable Set-Aside Deduction Explained*

One of the most important responsibilities of an Estate Administrator is ensuring that your organization receives the full gift your donor intended. In our experience, tax errors are a leading cause of reduced distributions to charitable beneficiaries.

The "substantially set aside" deduction is one of the most powerful tools available to protect a charitable bequest and ensure that assets pass to the nonprofit—rather than being unnecessarily diminished by taxes.

Estate Administrators must understand not only how this deduction works, but also what to question and review to safeguard the organization's interests.
Our presentation breaks this complex topic down into a clear, practical, and easy-to-understand format. Last year's video-enhanced program was extremely well received, and we look forward to incorporating engaging video segments again this year.

5:30pm: *Happy Hour, hosted by CGP Emerging Professionals Committee*
Find your peers with CGP's Emerging Professionals. Stop by this reception to mix, mingle, and meet.

Friday, October 16: Travel

Transportation by taxi from New Orleans Marriott to New Orleans airport (MSY)

American Airlines 3126, Depart MSY 2:05 pm, arrive DCA 5:40 pm

End of Trip