

**FEC
FORM 3X****REPORT OF RECEIPTS
AND DISBURSEMENTS**
For Other Than An Authorized Committee

Office Use Only

1. NAME OF COMMITTEE (in full) TYPE OR PRINT ▼ Example: If typing, type over the lines. 12FE4M5

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

ADDRESS (number and street) ▼

4245 N. Fairfax Drive

Suite 750

☐ Check if different than previously reported. (ACC)

Arlington

VA

22203

2. FEC IDENTIFICATION NUMBER ▼

CITY ▲

STATE ▲

ZIP CODE ▲

C C00333104

3. IS THIS REPORT

☐

NEW (N)

OR

☒

AMENDED (A)

4. TYPE OF REPORT

(Choose One)

(a) Quarterly Reports:

☐ April 15 Quarterly Report (Q1)☐ July 15 Quarterly Report (Q2)☐ October 15 Quarterly Report (Q3)☐ January 31 Year-End Report (YE)☐ July 31 Mid-Year Report (Non-election Year Only) (MY)☐ Termination Report (TER)

(b) Monthly Report Due On:

☐ Feb 20 (M2)☐ May 20 (M5)☐ Aug 20 (M8)☐ Nov 20 (M11) (Non-Election Year Only)☐ Mar 20 (M3)☐ Jun 20 (M6)☐ Sep 20 (M9)☐ Dec 20 (M12) (Non-Election Year Only)☒ Apr 20 (M4)☐ Jul 20 (M7)☐ Oct 20 (M10)☐ Jan 31 (YE)

(c) 12-Day

PRE-Election

Report for the:

☐ Primary (12P)☐ Convention (12C)☐ General (12G)☐ Special (12S)☐ Runoff (12R)

Election on

M M M / D D D / Y Y Y Y Y Y

in the State of

(d) 30-Day

POST-Election

Report for the:

☐ General (30G)☐ Runoff (30R)☐ Special (30S)

Election on

M M M / D D D / Y Y Y Y Y Y

in the State of

5. Covering Period

M M M / D D D / Y Y Y Y Y Y
03 01 2016

through

M M M / D D D / Y Y Y Y Y Y
03 31 2016

I certify that I have examined this Report and to the best of my knowledge and belief it is true, correct and complete.

Type or Print Name of Treasurer Brian H. Graff

Signature of Treasurer

Brian H. Graff

[Electronically Filed]

Date

M M M / D D D / Y Y Y Y Y Y
05 16 2016

NOTE: Submission of false, erroneous, or incomplete information may subject the person signing this Report to the penalties of 2 U.S.C. §437g.

Office
Use
Only**FEC FORM 3X**
Rev. 12/2004

SUMMARY PAGE OF RECEIPTS AND DISBURSEMENTS

FEC Form 3X (Rev. 02/2003)

Page 2

Write or Type Committee Name

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

Report Covering the Period: From: M M / D D / Y Y Y Y Y Y
03 01 2016 To: M M / D D / Y Y Y Y Y Y
03 31 2016

	COLUMN A This Period	COLUMN B Calendar Year-to-Date
6. (a) Cash on Hand January 1, Y Y Y Y Y Y 2016		174067.30
(b) Cash on Hand at Beginning of Reporting Period.....	190926.80	
(c) Total Receipts (from Line 19)	23338.34	47517.34
(d) Subtotal (add Lines 6(b) and 6(c) for Column A and Lines 6(a) and 6(c) for Column B).....	214265.14	221584.64
7. Total Disbursements (from Line 31)	482.16	7801.66
8. Cash on Hand at Close of Reporting Period (subtract Line 7 from Line 6(d))	213782.98	213782.98
9. Debts and Obligations Owed TO the Committee (Itemize all on Schedule C and/or Schedule D)	0.00	
10. Debts and Obligations Owed BY the Committee (Itemize all on Schedule C and/or Schedule D)	0.00	



This committee has qualified as a multicandidate committee. (see FEC FORM 1M)

For further information contact:

Federal Election Commission
999 E Street, NW
Washington, DC 20463

Toll Free 800-424-9530
Local 202-694-1100

DETAILED SUMMARY PAGE of Receipts

FEC Form 3X (Rev. 06/2004)

Page 3

Write or Type Committee Name

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

Report Covering the Period:

From:

M	M	/	D	D	/	Y	Y	Y	Y
0	3		0	1		2	0	1	6

To:

M	M	/	D	D	/	Y	Y	Y	Y
0	3		3	1		2	0	1	6

I. Receipts
COLUMN A
Total This Period

COLUMN B
Calendar Year-to-Date

11. Contributions (other than loans) From:

(a) Individuals/Persons Other

Than Political Committees

(i) Itemized (use Schedule A).....

21408.34

44160.34

(ii) Unitemized

1930.00

3357.00

(iii) TOTAL (add

Lines 11(a)(i) and (ii).....▶

23338.34

47517.34

(b) Political Party Committees

0.00

0.00

(c) Other Political Committees

(such as PACs).....

0.00

0.00

(d) Total Contributions (add Lines

11(a)(iii), (b), and (c)) (Carry

Totals to Line 33, page 5)

23338.34

47517.34

12. Transfers From Affiliated/Other

Party Committees.....

0.00

0.00

13. All Loans Received

0.00

0.00

14. Loan Repayments Received.....

0.00

0.00

15. Offsets To Operating Expenditures

(Refunds, Rebates, etc.)

(Carry Totals to Line 37, page 5).....

0.00

0.00

16. Refunds of Contributions Made

to Federal Candidates and Other

Political Committees.....

0.00

0.00

17. Other Federal Receipts

(Dividends, Interest, etc.).....

0.00

0.00

18. Transfers from Non-Federal and Levin Funds

(a) Non-Federal Account

(from Schedule H3)

0.00

0.00

(b) Levin Funds (from Schedule H5)

0.00

0.00

(c) Total Transfers (add 18(a) and 18(b))..

0.00

0.00

19. Total Receipts (add Lines 11(d),
12, 13, 14, 15, 16, 17, and 18(c)).....▶

23338.34

47517.34

20. Total Federal Receipts

(subtract Line 18(c) from Line 19)

23338.34

47517.34

DETAILED SUMMARY PAGE

of Disbursements

FEC Form 3X (Rev. 02/2003)

Page 4

II. Disbursements	COLUMN A Total This Period	COLUMN B Calendar Year-to-Date
21. Operating Expenditures:		
(a) Allocated Federal/Non-Federal Activity (from Schedule H4)		
(i) Federal Share	0.00	0.00
(ii) Non-Federal Share.....	0.00	0.00
(b) Other Federal Operating Expenditures	482.16	801.66
(c) Total Operating Expenditures (add 21(a)(i), (a)(ii), and (b))	482.16	801.66
22. Transfers to Affiliated/Other Party Committees.....	0.00	0.00
23. Contributions to Federal Candidates/Committees and Other Political Committees.....	0.00	7000.00
24. Independent Expenditures (use Schedule E)	0.00	0.00
25. Coordinated Party Expenditures (2 U.S.C. §441a(d)) (use Schedule F).....	0.00	0.00
26. Loan Repayments Made.....	0.00	0.00
27. Loans Made.....	0.00	0.00
28. Refunds of Contributions To:		
(a) Individuals/Persons Other Than Political Committees	0.00	0.00
(b) Political Party Committees	0.00	0.00
(c) Other Political Committees (such as PACs).....	0.00	0.00
(d) Total Contribution Refunds (add Lines 28(a), (b), and (c)).....	0.00	0.00
29. Other Disbursements	0.00	0.00
30. Federal Election Activity (2 U.S.C. §431(20))		
(a) Allocated Federal Election Activity (from Schedule H6)		
(i) Federal Share	0.00	0.00
(ii) "Levin" Share.....	0.00	0.00
(b) Federal Election Activity Paid Entirely With Federal Funds	0.00	0.00
(c) Total Federal Election Activity (add .. Lines 30(a)(i), 30(a)(ii) and 30(b))....	0.00	0.00
31. Total Disbursements (add Lines 21(c), 22, 23, 24, 25, 26, 27, 28(d), 29 and 30(c)) ..	482.16	7801.66
32. Total Federal Disbursements (subtract Line 21(a)(ii) and Line 30(a)(ii) from Line 31).....	482.16	7801.66

DETAILED SUMMARY PAGE
of Disbursements

FEC Form 3X (Rev. 02/2003)

Page 5

III. Net Contributions/Operating Expenditures	COLUMN A Total This Period	COLUMN B Calendar Year-to-Date
33. Total Contributions (other than loans) (from Line 11(d), page 3)	23338.34	47517.34
34. Total Contribution Refunds (from Line 28(d))	0.00	0.00
35. Net Contributions (other than loans) (subtract Line 34 from Line 33)	23338.34	47517.34
36. Total Federal Operating Expenditures (add Line 21(a)(i) and Line 21(b)) ►	482.16	801.66
37. Offsets to Operating Expenditures (from Line 15, page 3).....	0.00	0.00
38. Net Operating Expenditures (subtract Line 37 from Line 36) ►	482.16	801.66

SCHEDULE A (FEC Form 3X) **ITEMIZED RECEIPTS**

Use separate schedule(s)
for each category of the
Detailed Summary Page

FOR LINE NUMBER:
(check only one)

PAGE 6 OF 21

☒ 11a ☐ 11b ☐ 11c ☐ 12
☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17

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NAME OF COMMITTEE (In Full)

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

Full Name (Last, First, Middle Initial)

A. Sheri L Alsguth

Mailing Address 7603 Allegro Ct

City

Houston

State

TX

Zip Code

77040-2740

FEC ID number of contributing
federal political committee.

C

Name of Employer

Pinnacle Plan Design, PC

Occupation

ACTUARY

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

03 / 08 / 2016

Transaction ID : C3299567

Amount of Each Receipt this Period

250.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

B. Jeff Atwell

Mailing Address 2720 W 7th St Ste 202

City

Fort Worth

State

TX

Zip Code

76107-2257

FEC ID number of contributing
federal political committee.

C

Name of Employer

American National Bank of Texas Trust

Occupation

NEW BUSINESS DEVELOPMENT

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

03 / 23 / 2016

Transaction ID : C3299982

Amount of Each Receipt this Period

250.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

C. Thomas Bird

Mailing Address 7930 Panorama Dr

City

Owings

State

MD

Zip Code

20736

FEC ID number of contributing
federal political committee.

C

Name of Employer

Wells Fargo Advisors

Occupation

Information Requested

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

03 / 23 / 2016

Transaction ID : C3316982

Amount of Each Receipt this Period

250.00

☐ Memo Item

SUBTOTAL of Receipts This Page (optional)..... ►

TOTAL This Period (last page this line number only)..... ►

750.00

SCHEDULE A (FEC Form 3X)
ITEMIZED RECEIPTSUse separate schedule(s)
for each category of the
Detailed Summary PageFOR LINE NUMBER: PAGE 7 OF 21
(check only one)

☒ 11a	☐ 11b	☐ 11c	☐ 12
☐ 13	☐ 14	☐ 15	☐ 16
☐ 17			

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NAME OF COMMITTEE (In Full)

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

Full Name (Last, First, Middle Initial)

A. Kerry BoyceMailing Address 7098 E Cochise Road
Suite 200

City	State	Zip Code
Scottsdale	AZ	85253-4517

FEC ID number of contributing
federal political committee.

C

Name of Employer

Boyce & Associates, Inc.

Occupation

Pension consultant

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

1000.00

Date of Receipt

M M M	/	D D D	/	Y Y Y Y Y Y
03	/	08	/	2016

Transaction ID : C3299568

Amount of Each Receipt this Period

1000.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

B. Sam Brandwein

Mailing Address 1098 SW 9th Terrace

City	State	Zip Code
Boca Raton	FL	33486-5473

FEC ID number of contributing
federal political committee.

C

Name of Employer

Morgan Stanley Smith Barney

Occupation

INVESTMENT ADVISOR

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M M	/	D D D	/	Y Y Y Y Y Y
03	/	06	/	2016

Transaction ID : C3299565

Amount of Each Receipt this Period

500.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

C. Ronald Church

Mailing Address 4900 California Ave. Tower B-210

City	State	Zip Code
Bakersfield	CA	93309

FEC ID number of contributing
federal political committee.

C

Name of Employer

Ironwood Retirement Plan Consultants

Occupation

FINANCIAL PLANNER

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M M	/	D D D	/	Y Y Y Y Y Y
03	/	10	/	2016

Transaction ID : C3299558

Amount of Each Receipt this Period

500.00

☐ Memo Item

SUBTOTAL of Receipts This Page (optional)..... ►

2000.00

TOTAL This Period (last page this line number only)..... ►

SCHEDULE A (FEC Form 3X) **ITEMIZED RECEIPTS**

Use separate schedule(s)
for each category of the
Detailed Summary Page

FOR LINE NUMBER: PAGE 8 OF 21

(check only one)

☒ 11a ☐ 11b ☐ 11c ☐ 12
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NAME OF COMMITTEE (In Full)

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

Full Name (Last, First, Middle Initial)

A. Michelle Coble

Mailing Address 1601 NW Expressway Ste 1310

City State Zip Code
 Oklahoma City OK 73118-1432

FEC ID number of contributing federal political committee.

C

Name of Employer

MetLife

Occupation

CRPS

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

1000.00

Date of Receipt

M M M / D D D / Y Y Y Y Y Y
 03 10 2016

Transaction ID : C3299571

Amount of Each Receipt this Period

1000.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

B. Jordan Cross

Mailing Address 245 Fischer Ave

City State Zip Code
 Costa Mesa CA 92626-4535

FEC ID number of contributing federal political committee.

C

Name of Employer

Jack A. Cross & Associates, Inc.

Occupation

THIRD PARTY ADMINISTRATOR

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M M / D D D / Y Y Y Y Y Y
 03 21 2016

Transaction ID : C3299939

Amount of Each Receipt this Period

500.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

C. Jodie Dailey

Mailing Address 8820 Columbia 100 Pkwy Ste 401

City State Zip Code
 Columbia MD 21045-2175

FEC ID number of contributing federal political committee.

C

Name of Employer

Columbia Benefit Consultants

Occupation

VICE PRESIDENT

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

M M M / D D D / Y Y Y Y Y Y
 03 21 2016

Transaction ID : C3299912

Amount of Each Receipt this Period

250.00

☐ Memo Item

SUBTOTAL of Receipts This Page (optional)..... ►

TOTAL This Period (last page this line number only)..... ►

1750.00

SCHEDULE A (FEC Form 3X) **ITEMIZED RECEIPTS**

Use separate schedule(s)
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Detailed Summary Page

FOR LINE NUMBER:
(check only one)

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☒ 11a ☐ 11b ☐ 11c ☐ 12
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NAME OF COMMITTEE (In Full)

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

Full Name (Last, First, Middle Initial)

A. Corby Dall

Mailing Address 33272 Valle Rd.

City State Zip Code
 San Juan Capistrano CA 92675-4849

FEC ID number of contributing
federal political committee.

C

Name of Employer
LPL Financial Retirement Partners

Occupation
Information Requested

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
 03 / 22 / 2016

Transaction ID : C3299958

Amount of Each Receipt this Period

500.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

B. Mark Davis

Mailing Address 15760 Ventuar Blvd
 Suite 910

City State Zip Code
 Encino CA 91436-3000

FEC ID number of contributing
federal political committee.

C

Name of Employer
Kravits Davis Sansome

Occupation
Pension consultant

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
 03 / 09 / 2016

Transaction ID : C3316967

Amount of Each Receipt this Period

500.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

C. Barb Delaney

Mailing Address 20 North Main Street

City State Zip Code
 Pearl River NY 10965-2317

FEC ID number of contributing
federal political committee.

C

Name of Employer
Stone Street Equity

Occupation
PRESIDENT

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

1000.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
 03 / 18 / 2016

Transaction ID : C3299579

Amount of Each Receipt this Period

1000.00

☐ Memo Item

SUBTOTAL of Receipts This Page (optional)..... ►

TOTAL This Period (last page this line number only)..... ►

2000.00

SCHEDULE A (FEC Form 3X) **ITEMIZED RECEIPTS**

Use separate schedule(s)
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Detailed Summary Page

FOR LINE NUMBER:
(check only one)

PAGE 10 OF 21

☒ 11a ☐ 11b ☐ 11c ☐ 12
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NAME OF COMMITTEE (In Full)

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

Full Name (Last, First, Middle Initial)

A. Stephen L Dobrow

Mailing Address 875 Mahler Road, Suite 105

City State Zip Code
 Burlingame CA 94010-1615

FEC ID number of contributing
federal political committee.

C

Name of Employer

Occupation

Primark Benefits

Pension consultant

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

2500.00

Date of Receipt

03 / 14 / 2016

Transaction ID : C3299574

Amount of Each Receipt this Period

2500.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

B. Lorraine Dorsa

Mailing Address 13901 Sutton Park Drive South

City State Zip Code
 Jacksonville FL 32224

FEC ID number of contributing
federal political committee.

C

Name of Employer

Occupation

DCS Retirement Group

ACTUARY

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

03 / 22 / 2016

Transaction ID : C3299973

Amount of Each Receipt this Period

500.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

C. Don Ford

Mailing Address 1177 Hypoluxo Rd Fl 1

City State Zip Code
 Lantana FL 33462-4244

FEC ID number of contributing
federal political committee.

C

Name of Employer

Occupation

Pinnacle Financial Services, Inc.

PRESIDENT

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

03 / 21 / 2016

Transaction ID : C3299911

Amount of Each Receipt this Period

250.00

☐ Memo Item

SUBTOTAL of Receipts This Page (optional)..... ►

TOTAL This Period (last page this line number only)..... ►

3250.00

SCHEDULE A (FEC Form 3X) **ITEMIZED RECEIPTS**

Use separate schedule(s)
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Detailed Summary Page

FOR LINE NUMBER:
(check only one)

PAGE 11 OF 21

☒ 11a ☐ 11b ☐ 11c ☐ 12
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NAME OF COMMITTEE (In Full)

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

Full Name (Last, First, Middle Initial)

A. Don Fry

Mailing Address 333 N Greene St Ste 403

City

Greensboro

State

NC

Zip Code

27401-2184

FEC ID number of contributing
federal political committee.

C

Name of Employer

Fry Financial Consultants, Inc.

Occupation

PRESIDENT

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
03 / 31 / 2016

Transaction ID : C3299563

Amount of Each Receipt this Period

500.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

B. Sandra L. Grant

Mailing Address 1429 King Ave

City

Columbus

State

OH

Zip Code

43212

FEC ID number of contributing
federal political committee.

C

Name of Employer

First Ohio Planning Corp

Occupation

Information Requested

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
03 / 30 / 2016

Transaction ID : C3316984

Amount of Each Receipt this Period

250.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

C. Rick Herdrich

Mailing Address P.O. Box 37

City

Palatine

State

IL

Zip Code

60078-0037

FEC ID number of contributing
federal political committee.

C

Name of Employer

Creative Pension Design, Inc.

Occupation

PRESIDENT

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
03 / 21 / 2016

Transaction ID : C3299888

Amount of Each Receipt this Period

500.00

☐ Memo Item

SUBTOTAL of Receipts This Page (optional)..... ►

1250.00

TOTAL This Period (last page this line number only)..... ►

SCHEDULE A (FEC Form 3X)
ITEMIZED RECEIPTSUse separate schedule(s)
for each category of the
Detailed Summary PageFOR LINE NUMBER: PAGE 12 OF 21
(check only one)

☒ 11a	☐ 11b	☐ 11c	☐ 12
☐ 13	☐ 14	☐ 15	☐ 16
☐ 17			

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NAME OF COMMITTEE (In Full)

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

Full Name (Last, First, Middle Initial)

A. Glendon Hughes

Mailing Address 2110 SE Rays Way

City	State	Zip Code
Stuart	FL	34994

FEC ID number of contributing
federal political committee.

C

Name of Employer

The Pension Source, Inc.

Occupation

VICEPRESIDENT

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M M	/	D D D	/	Y Y Y Y Y Y
03	/	21	/	2016

Transaction ID : C3299882

Amount of Each Receipt this Period

500.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

B. DeNoyior F. Joseph

Mailing Address 1410 Spring Hill Road Suite 425

City	State	Zip Code
Mc Lean	VA	22102

FEC ID number of contributing
federal political committee.

C

Name of Employer

Washington Financial Group

Occupation

Managing Partner

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

1000.00

Date of Receipt

M M M	/	D D D	/	Y Y Y Y Y Y
03	/	06	/	2016

Transaction ID : C3299566

Amount of Each Receipt this Period

500.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

C. DeNoyior F. Joseph

Mailing Address 1410 Spring Hill Road Suite 425

City	State	Zip Code
Mc Lean	VA	22102

FEC ID number of contributing
federal political committee.

C

Name of Employer

Washington Financial Group

Occupation

Managing Partner

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

1000.00

Date of Receipt

M M M	/	D D D	/	Y Y Y Y Y Y
03	/	18	/	2016

Transaction ID : C3299580

Amount of Each Receipt this Period

500.00

☐ Memo Item

SUBTOTAL of Receipts This Page (optional)..... ▶

TOTAL This Period (last page this line number only)..... ▶

1500.00

SCHEDULE A (FEC Form 3X) **ITEMIZED RECEIPTS**

Use separate schedule(s)
for each category of the
Detailed Summary Page

FOR LINE NUMBER:
(check only one)

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NAME OF COMMITTEE (In Full)

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

Full Name (Last, First, Middle Initial)

A. Michael Kane

Mailing Address 2300 Lakeview Parkway Suite 700

City State Zip Code
 Alpharetta GA 30076

FEC ID number of contributing
federal political committee.

C

Name of Employer

Michael M. Kane & Associates, LLC

Occupation

Information Requested

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

03 / 14 / 2016

Transaction ID : C3299572

Amount of Each Receipt this Period

500.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

B. Kathleen Kelly

Mailing Address 3623 Nort Elm St

City State Zip Code
 Greensboro NC 27455-2604

FEC ID number of contributing
federal political committee.

C

Name of Employer

Compass Financial Partners

Occupation

OTHER

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

1000.00

Date of Receipt

03 / 19 / 2016

Transaction ID : C3299627

Amount of Each Receipt this Period

1000.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

C. Lisa Kottler

Mailing Address 1250 S Capital of Texas Hwy

City State Zip Code
 Austin TX 78746-6446

FEC ID number of contributing
federal political committee.

C

Name of Employer

NFP

Occupation

VICE PRESIDENT

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

700.00

Date of Receipt

03 / 17 / 2016

Transaction ID : C3299575

Amount of Each Receipt this Period

500.00

☐ Memo Item

SUBTOTAL of Receipts This Page (optional)..... ►

TOTAL This Period (last page this line number only)..... ►

2000.00

SCHEDULE A (FEC Form 3X) **ITEMIZED RECEIPTS**

Use separate schedule(s)
for each category of the
Detailed Summary Page

FOR LINE NUMBER:
(check only one)

PAGE 14 OF 21

☒ 11a ☐ 11b ☐ 11c ☐ 12
☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17

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NAME OF COMMITTEE (In Full)

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

Full Name (Last, First, Middle Initial)

A. Lisa Kottler

Mailing Address 1250 S Capital of Texas Hwy

City State Zip Code
Austin TX 78746-6446

FEC ID number of contributing
federal political committee.

C

Name of Employer

NFP

Occupation

VICE PRESIDENT

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

700.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
03 / 17 / 2016

Transaction ID : C3299576

Amount of Each Receipt this Period

200.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

B. James Marshall

Mailing Address 6329 West Mequon Road

City State Zip Code
Mequon WI 53092

FEC ID number of contributing
federal political committee.

C

Name of Employer

Spectrum Investment Advisors

Occupation

President

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
03 / 02 / 2016

Transaction ID : C3316964

Amount of Each Receipt this Period

250.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

C. Abby Morgan

Mailing Address 414 Walnut Street Suite 1240

City State Zip Code
Cincinnati OH 45202

FEC ID number of contributing
federal political committee.

C

Name of Employer

Euckles Wealth Management

Occupation

Information Requested

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
03 / 17 / 2016

Transaction ID : C3299577

Amount of Each Receipt this Period

250.00

☐ Memo Item

SUBTOTAL of Receipts This Page (optional)..... ►

TOTAL This Period (last page this line number only)..... ►

700.00

SCHEDULE A (FEC Form 3X) **ITEMIZED RECEIPTS**

Use separate schedule(s)
for each category of the
Detailed Summary Page

FOR LINE NUMBER:
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NAME OF COMMITTEE (In Full)

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

Full Name (Last, First, Middle Initial)

A. Vince Morris

Mailing Address 11221 Roe Ave

City

Leawood

State

KS

Zip Code

66211

FEC ID number of contributing
federal political committee.

C

Name of Employer

Bukaty Companies

Occupation

VICE PRESIDENT

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

1000.00

Date of Receipt

03 / 04 / 2016

Transaction ID : C3316966

Amount of Each Receipt this Period

1000.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

B. Fabio M Perla

Mailing Address 14323 South Outer Forty Road
Suite 310-N

City

Chesterfield

State

MO

Zip Code

63017

FEC ID number of contributing
federal political committee.

C

Name of Employer

Benefits of Missouri, Inc

Occupation

Pension consultant

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

03 / 21 / 2016

Transaction ID : C3316970

Amount of Each Receipt this Period

500.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

C. Terry Ronczkowski

Mailing Address 1626 W Colonial Pkwy

City

Inverness

State

IL

Zip Code

60067-4725

FEC ID number of contributing
federal political committee.

C

Name of Employer

Pension Administrators, Inc.

Occupation

PRESIDENT

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

1000.00

Date of Receipt

03 / 21 / 2016

Transaction ID : C3299933

Amount of Each Receipt this Period

1000.00

☐ Memo Item

SUBTOTAL of Receipts This Page (optional)..... ►

TOTAL This Period (last page this line number only)..... ►

2500.00

SCHEDULE A (FEC Form 3X) **ITEMIZED RECEIPTS**

Use separate schedule(s)
for each category of the
Detailed Summary Page

FOR LINE NUMBER: PAGE 16 OF 21

(check only one)

☒ 11a ☐ 11b ☐ 11c ☐ 12
☐ 13 ☐ 14 ☐ 15 ☐ 16 ☐ 17

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NAME OF COMMITTEE (In Full)

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

Full Name (Last, First, Middle Initial)

A. Jen San Fillippo

Mailing Address 675 N. Barker Road

City State Zip Code
 Brookfield WI 53045

FEC ID number of contributing federal political committee.

C

Name of Employer

La Bri Group Retirement Services

Occupation

PRESIDENT

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
 03 23 2016

Transaction ID : C3299983

Amount of Each Receipt this Period

250.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

B. Steve Shearn

Mailing Address 1188 Padre Dr

City State Zip Code
 Salinas CA 93901-2259

FEC ID number of contributing federal political committee.

C

Name of Employer

Hayashi & Wayland Retirement Plan Serv

Occupation

PRESIDENT

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
 03 24 2016

Transaction ID : C3299985

Amount of Each Receipt this Period

250.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

C. Eric Smith

Mailing Address 400 Linden Oaks

City State Zip Code
 Rochester NY 14625-2818

FEC ID number of contributing federal political committee.

C

Name of Employer

UBS Financial Services

Occupation

INVESTMENT ADVISOR

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
 03 09 2016

Transaction ID : C3299570

Amount of Each Receipt this Period

500.00

☐ Memo Item

SUBTOTAL of Receipts This Page (optional)..... ►

1000.00

TOTAL This Period (last page this line number only)..... ►

SCHEDULE A (FEC Form 3X)
ITEMIZED RECEIPTSUse separate schedule(s)
for each category of the
Detailed Summary PageFOR LINE NUMBER: PAGE 17 OF 21
(check only one)

☒ 11a	☐ 11b	☐ 11c	☐ 12
☐ 13	☐ 14	☐ 15	☐ 16
☐ 17			

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NAME OF COMMITTEE (In Full)

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

Full Name (Last, First, Middle Initial)

A. Peggy SmithMailing Address 780 Johnson Ferry Road NE
Suite 325

City	State	Zip Code
Atlanta	GA	30342-1434

FEC ID number of contributing
federal political committee.

C

Name of Employer

Retirement Plan Administrators, LLC

Occupation

Pension consultant

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

M M M	/	D D D	/	Y Y Y Y Y Y
03	/	20	/	2016

Transaction ID : C3316969

Amount of Each Receipt this Period

250.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

B. Stigs Stiglich

Mailing Address 3077 W Jefferson St Ste 105

City	State	Zip Code
Joliet	IL	60435-5263

FEC ID number of contributing
federal political committee.

C

Name of Employer

CliftonLarsonAllen Wealth Advisors

Occupation

PRESIDENT

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M M	/	D D D	/	Y Y Y Y Y Y
03	/	21	/	2016

Transaction ID : C3299808

Amount of Each Receipt this Period

500.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

C. Allan E Swedelson

Mailing Address 16530 Ventura Blvd, Suite 401

City	State	Zip Code
Encino	CA	91436-4554

FEC ID number of contributing
federal political committee.

C

Name of Employer

Goldberg, Swedelson & Associates

Occupation

Pension consultant

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

M M M	/	D D D	/	Y Y Y Y Y Y
03	/	14	/	2016

Transaction ID : C3299573

Amount of Each Receipt this Period

250.00

☐ Memo Item

SUBTOTAL of Receipts This Page (optional)..... ▶

1000.00

TOTAL This Period (last page this line number only)..... ▶

SCHEDULE A (FEC Form 3X)
ITEMIZED RECEIPTSUse separate schedule(s)
for each category of the
Detailed Summary PageFOR LINE NUMBER: PAGE 18 OF 21
(check only one)

☒ 11a	☐ 11b	☐ 11c	☐ 12
☐ 13	☐ 14	☐ 15	☐ 16
☐ 17			

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NAME OF COMMITTEE (In Full)

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

Full Name (Last, First, Middle Initial)

A. Lee Swerdlin

Mailing Address 5901 Peachtree Dunwoody Rd NE

City	State	Zip Code
Atlanta	GA	30328-5382

FEC ID number of contributing
federal political committee.

C

Name of Employer
Swerdlin & CompanyOccupation
EXECUTIVE

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M M	/	D D D	/	Y Y Y Y Y Y
03	/	21	/	2016

Transaction ID : C3299953

Amount of Each Receipt this Period

500.00

☐ Memo Item

Full Name (Last, First, Middle Initial)

B. Peter K Swisher

Mailing Address 2353 Alexandria Drive, Suite 100

City	State	Zip Code
Lexington	KY	40504-3208

FEC ID number of contributing
federal political committee.

C

Name of Employer
Unified Trust Company, NAOccupation
Pension consultant

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

208.34

Date of Receipt

M M M	/	D D D	/	Y Y Y Y Y Y
03	/	09	/	2016

Transaction ID : C3299569

Amount of Each Receipt this Period

208.34

☐ Memo Item

Full Name (Last, First, Middle Initial)

C. John Wilcox

Mailing Address 287 Turnpike Road #250

City	State	Zip Code
Westborough	MA	01581-2882

FEC ID number of contributing
federal political committee.

C

Name of Employer
Mayflower Advisors, LLCOccupation
FINANCIAL PLANNER

Receipt For: 2016

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M M	/	D D D	/	Y Y Y Y Y Y
03	/	18	/	2016

Transaction ID : C3299578

Amount of Each Receipt this Period

500.00

☐ Memo Item

SUBTOTAL of Receipts This Page (optional)..... ▶

TOTAL This Period (last page this line number only)..... ▶

1208.34

SCHEDULE A (FEC Form 3X) **ITEMIZED RECEIPTS**

Use separate schedule(s)
for each category of the
Detailed Summary Page

FOR LINE NUMBER: PAGE 19 OF 21

(check only one)

☒ 11a ☐ 11b ☐ 11c ☐ 12
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NAME OF COMMITTEE (In Full)

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

Full Name (Last, First, Middle Initial)

A. Max Wyman

Mailing Address PO Box 48275

City

Minneapolis

State

MN

Zip Code

55448-0275

FEC ID number of contributing
federal political committee.

C

Name of Employer

Creative Benefit Strategies, Inc.

Occupation

ACTUARY

Receipt For: 2016



Primary



General



Other (specify) ▼

Aggregate Year-to-Date ▼

250.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
03 / 21 / 2016

Transaction ID : C3299883

Amount of Each Receipt this Period

250.00



Memo Item

Full Name (Last, First, Middle Initial)

B. Lynn Young

Mailing Address 4835 E Cactus Rd Ste 260

City

Scottsdale

State

AZ

Zip Code

85254-4198

FEC ID number of contributing
federal political committee.

C

Name of Employer

Coble Pension Group, LLC

Occupation

VICE PRESIDENT

Receipt For: 2016



Primary



General



Other (specify) ▼

Aggregate Year-to-Date ▼

375.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
03 / 10 / 2016

Transaction ID : C3299560

Amount of Each Receipt this Period

125.00



Memo Item

Full Name (Last, First, Middle Initial)

C. Lynn Young

Mailing Address 4835 E Cactus Rd Ste 260

City

Scottsdale

State

AZ

Zip Code

85254-4198

FEC ID number of contributing
federal political committee.

C

Name of Employer

Coble Pension Group, LLC

Occupation

VICE PRESIDENT

Receipt For: 2016



Primary



General



Other (specify) ▼

Aggregate Year-to-Date ▼

375.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
03 / 31 / 2016

Transaction ID : C3299561

Amount of Each Receipt this Period

125.00



Memo Item

SUBTOTAL of Receipts This Page (optional)..... ►

500.00

TOTAL This Period (last page this line number only)..... ►

21408.34

**SCHEDULE B (FEC Form 3X)
ITEMIZED DISBURSEMENTS**Use separate schedule(s)
for each category of the
Detailed Summary PageFOR LINE NUMBER:
(check only one)

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☒ 21b ☐ 22 ☐ 23 ☐ 24 ☐ 25 ☐ 26
☐ 27 ☐ 28a ☐ 28b ☐ 28c ☐ 29 ☐ 30b

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NAME OF COMMITTEE (In Full)

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

Full Name (Last, First, Middle Initial)

A. American Express

Date of Disbursement

M	M	M	/	D	D	D	/	Y	Y	Y	Y	Y	Y
0	3			0	7			2	0	1	6		

Mailing Address Post Office Box 53852

City	State	Zip Code
Phoenix	AZ	85072-3852

Transaction ID : D172523Purpose of Disbursement
credit card/ accounting fees

Amount of Each Disbursement this Period

Candidate Name

Category/
Type

272.90

☐ Memo Item

Office Sought:	House	Disbursement For: 2016	☒ Primary ☐ General ☐ Other (specify) ▼
	Senate		
	President		
State:	District:		

Full Name (Last, First, Middle Initial)

B. SunTrust Bank

Date of Disbursement

M	M	M	/	D	D	D	/	Y	Y	Y	Y	Y	Y
0	3			1	0			2	0	1	6		

Mailing Address Post Office Box 85024

City	State	Zip Code
Richmond	VA	23285-5024

Transaction ID : D172520Purpose of Disbursement
credit card/ accounting fees

Amount of Each Disbursement this Period

Candidate Name

Category/
Type

23.09

☐ Memo Item

Office Sought:	House	Disbursement For: 2016	☒ Primary ☐ General ☐ Other (specify) ▼
	Senate		
	President		
State:	District:		

Full Name (Last, First, Middle Initial)

C. SunTrust Bank

Date of Disbursement

M	M	M	/	D	D	D	/	Y	Y	Y	Y	Y	Y
0	3			1	0			2	0	1	6		

Mailing Address Post Office Box 85024

City	State	Zip Code
Richmond	VA	23285-5024

Transaction ID : D172521Purpose of Disbursement
credit card/ accounting fees

Amount of Each Disbursement this Period

Candidate Name

Category/
Type

47.03

☐ Memo Item

Office Sought:	House	Disbursement For: 2016	☒ Primary ☐ General ☐ Other (specify) ▼
	Senate		
	President		
State:	District:		

SUBTOTAL of Disbursements This Page (optional)..... ►**TOTAL** This Period (last page this line number only)..... ►

343.02

**SCHEDULE B (FEC Form 3X)
ITEMIZED DISBURSEMENTS**Use separate schedule(s)
for each category of the
Detailed Summary PageFOR LINE NUMBER:
(check only one)

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☒ 21b ☐ 22 ☐ 23 ☐ 24 ☐ 25 ☐ 26
☐ 27 ☐ 28a ☐ 28b ☐ 28c ☐ 29 ☐ 30b

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NAME OF COMMITTEE (In Full)

The American Society of Pension Professionals and Actuaries Political Action Committee (ASPPA-NAPA PAC)

Full Name (Last, First, Middle Initial)

A. SunTrust Bank

Date of Disbursement

M	M	M	/	D	D	D	/	Y	Y	Y	Y	Y	Y
0	3							2	0	1	6		

Mailing Address Post Office Box 85024

City	State	Zip Code
Richmond	VA	23285-5024

Transaction ID : D172522

Purpose of Disbursement
credit card/ accounting fees

Amount of Each Disbursement this Period

Candidate Name

Category/
Type

139.14

Office Sought:	☐ House
	☐ Senate
	☐ President

Disbursement For: 2016

☐ Primary ☐ General
☒ Other (specify) ▼
☐ Memo Item

State: District: Convention

Full Name (Last, First, Middle Initial)

B.

Date of Disbursement

M	M	M	/	D	D	D	/	Y	Y	Y	Y	Y	Y

Mailing Address

City	State	Zip Code

Purpose of Disbursement

Amount of Each Disbursement this Period

Candidate Name

Category/
Type

Office Sought:	☐ House
	☐ Senate
	☐ President

Disbursement For:

☐ Primary ☐ General
☐ Other (specify) ▼
☐ Memo Item

State: District:

Full Name (Last, First, Middle Initial)

C.

Date of Disbursement

M	M	M	/	D	D	D	/	Y	Y	Y	Y	Y	Y

Mailing Address

City	State	Zip Code

Purpose of Disbursement

Amount of Each Disbursement this Period

Candidate Name

Category/
Type

Office Sought:	☐ House
	☐ Senate
	☐ President

Disbursement For:

☐ Primary ☐ General
☐ Other (specify) ▼
☐ Memo Item

State: District:

SUBTOTAL of Disbursements This Page (optional)..... ►**TOTAL** This Period (last page this line number only)..... ►

139.14

482.16