

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 FINANCIAL PLANNING ASSOCIATION POLITICAL ACTION COMMITTEE

ADDRESS (number and street) PO Box 33079 Washington DC 20033-0079 Check if different than previously reported. (ACC)

2. FEC IDENTIFICATION NUMBER C00370130 CITY STATE ZIP CODE 3. IS THIS REPORT NEW (N) OR AMENDED (A)

4. TYPE OF REPORT (Choose One) (a) Quarterly Reports: April 15, July 15, October 15, January 31, July 31 Mid-Year Report (selected), Termination Report (b) Monthly Report Due On: Feb 20, Mar 20, Apr 20, May 20, Jun 20, Jul 20, Aug 20, Sep 20, Oct 20, Nov 20, Dec 20, Jan 31 (c) 12-Day PRE-Election Report for the: Primary, General, Runoff, Convention, Special (d) 30-Day POST-Election Report for the: General, Runoff, Special

5. Covering Period 01 / 01 / 2023 through 06 / 30 / 2023

I certify that I have examined this Report and to the best of my knowledge and belief it is true, correct and complete. Pare, Frank, Type or Print Name of Treasurer

Signature of Treasurer Pare, Frank, [Electronically Filed] Date 07 / 24 / 2023

NOTE: Submission of false, erroneous, or incomplete information may subject the person signing this Report to the penalties of 52 U.S.C. § 30109.

**SUMMARY PAGE  
OF RECEIPTS AND DISBURSEMENTS**

FEC Form 3X (Rev. 05/2016)

Write or Type Committee Name

**FINANCIAL PLANNING ASSOCIATION POLITICAL ACTION COMMITTEE**

Report Covering the Period: From:  /  /  To:  /  /

	COLUMN A This Period	COLUMN B Calendar Year-to-Date
6. (a) Cash on Hand January 1, <input type="text" value="2023"/>		185031.61
(b) Cash on Hand at Beginning of Reporting Period.....	185031.61	
(c) Total Receipts (from Line 19) .....	42350.00	42350.00
(d) Subtotal (add Lines 6(b) and 6(c) for Column A and Lines 6(a) and 6(c) for Column B).....	227381.61	227381.61
7. Total Disbursements (from Line 31).....	7046.29	7046.29
8. Cash on Hand at Close of Reporting Period (subtract Line 7 from Line 6(d)).....	220335.32	220335.32
9. Debts and Obligations Owed <b>TO</b> the Committee (Itemize all on Schedule C and/or Schedule D) .....	0.00	
10. Debts and Obligations Owed <b>BY</b> 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

Write or Type Committee Name

FINANCIAL PLANNING ASSOCIATION POLITICAL ACTION COMMITTEE

Report Covering the Period: From: 01 / 01 / 2023 To: 06 / 30 / 2023

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).....	40890.00	40890.00
(ii) Unitemized .....	1460.00	1460.00
(iii) TOTAL (add Lines 11(a)(i) and (ii)).....▶	42350.00	42350.00
(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) .....	42350.00	42350.00
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)).....▶	42350.00	42350.00
20. Total Federal Receipts (subtract Line 18(c) from Line 19).....▶	42350.00	42350.00

**DETAILED SUMMARY PAGE**

of Disbursements

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 .....	7046.29	7046.29
(c) Total Operating Expenditures (add 21(a)(i), (a)(ii), and (b)) .....	7046.29	7046.29
22. Transfers to Affiliated/Other Party Committees.....	0.00	0.00
23. Contributions to Federal Candidates/Committees and Other Political Committees.....	0.00	0.00
24. Independent Expenditures (use Schedule E) .....	0.00	0.00
25. Coordinated Party Expenditures (52 U.S.C. § 30116(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 (Including Non-Federal Donations).....	0.00	0.00
30. Federal Election Activity (52 U.S.C. § 30101(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)) ..	7046.29	7046.29
32. Total Federal Disbursements (subtract Line 21(a)(ii) and Line 30(a)(ii) from Line 31).....	7046.29	7046.29

**DETAILED SUMMARY PAGE**  
of Disbursements

FEC Form 3X (Rev. 05/2016)

Page 5

<b>III. Net Contributions/ Operating Expenditures</b>	<b>COLUMN A Total This Period</b>	<b>COLUMN B Calendar Year-to-Date</b>
33. Total Contributions (other than loans) (from Line 11(d), page 3) .....	42350.00	42350.00
34. Total Contribution Refunds (from Line 28(d)) .....	0.00	0.00
35. Net Contributions (other than loans) (subtract Line 34 from Line 33) .....	42350.00	42350.00
36. Total Federal Operating Expenditures (add Line 21(a)(i) and Line 21(b)) .....	7046.29	7046.29
37. Offsets to Operating Expenditures (from Line 15, page 3).....	0.00	0.00
38. Net Operating Expenditures (subtract Line 37 from Line 36) .....	7046.29	7046.29

**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 15
<input checked="" type="checkbox"/> 11a	<input type="checkbox"/> 11b	<input type="checkbox"/> 11c	<input type="checkbox"/> 12
<input type="checkbox"/> 13	<input type="checkbox"/> 14	<input type="checkbox"/> 15	<input type="checkbox"/> 16 <input type="checkbox"/> 17

Any information copied from such Reports and Statements may not be sold or used by any person for the purpose of soliciting contributions or for commercial purposes, other than using the name and address of any political committee to solicit contributions from such committee.

NAME OF COMMITTEE (In Full)  
**FINANCIAL PLANNING ASSOCIATION POLITICAL ACTION COMMITTEE**

**A. Armstrong, Alexandra, , ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 700 John Ringling Blvd #N309  
 City Sarasota State FL Zip Code 32436  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) Armstrong Fleming & Moore, Inc Occupation (for Individual) Chairman  
 Receipt For:  Primary  General  Other (specify) ▼  
 Aggregate Year-to-Date ▼ 1000.00

Date of Receipt 05 / 06 / 2023  
**Transaction ID : SA11AI.7587**  
 Amount of Each Receipt this Period 1000.00  
 Memo Item

**B. Boebinger, Dean, L., ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 14505 Palazzo Dr  
 City Houston State TX Zip Code 77070  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) Strategic Financial Concepts Occupation (for Individual) Director  
 Receipt For:  Primary  General  Other (specify) ▼  
 Aggregate Year-to-Date ▼ 2000.00

Date of Receipt 04 / 13 / 2023  
**Transaction ID : SA11AI.7575**  
 Amount of Each Receipt this Period 2000.00  
 Memo Item

**C. Carter, Bill, , ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 12222 Merit Dr Ste 1800  
 City Dallas State TX Zip Code 75251  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) Carter Financial Management Occupation (for Individual) President  
 Receipt For:  Primary  General  Other (specify)  
 Aggregate Year-to-Date ▼ 1000.00

Date of Receipt 05 / 31 / 2023  
**Transaction ID : SA11AI.7579**  
 Amount of Each Receipt this Period 1000.00  
 Memo Item

<b>SUBTOTAL</b> of Receipts This Page (optional).....	4000.00
<b>TOTAL</b> 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: (check only one)	PAGE 7 OF 15
<input checked="" type="checkbox"/> 11a	<input type="checkbox"/> 11b	<input type="checkbox"/> 11c	<input type="checkbox"/> 12
<input type="checkbox"/> 13	<input type="checkbox"/> 14	<input type="checkbox"/> 15	<input type="checkbox"/> 16 <input type="checkbox"/> 17

Any information copied from such Reports and Statements may not be sold or used by any person for the purpose of soliciting contributions or for commercial purposes, other than using the name and address of any political committee to solicit contributions from such committee.

NAME OF COMMITTEE (In Full)  
**FINANCIAL PLANNING ASSOCIATION POLITICAL ACTION COMMITTEE**

**A. Furer, Gregory, A., ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 645 Rodi Road  
 Suite 300  
 City Pittsburgh State PA Zip Code 15235  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) Beratung Advisors Occupation (for Individual) CEO  
 Receipt For:  Primary  General  Other (specify) ▼  
 Aggregate Year-to-Date ▼ 2501.00

Date of Receipt 02 / 09 / 2023  
**Transaction ID : SA11AI.7565**  
 Amount of Each Receipt this Period 2501.00  
 Memo Item

**B. Galli, Daniel, J., ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 101 Longwater Circle  
 City Norwell State MA Zip Code 02061  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) Daniel J. Gallie & Associates Occupation (for Individual) President  
 Receipt For:  Primary  General  Other (specify) ▼  
 Aggregate Year-to-Date ▼ 2500.00

Date of Receipt 03 / 08 / 2023  
**Transaction ID : SA11AI.7567**  
 Amount of Each Receipt this Period 2500.00  
 Memo Item

**C. Keller, Kevin, R., ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 1521 O St., NW  
 City Washington State DC Zip Code 20005  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) CFP Board of Standards Occupation (for Individual) CEO  
 Receipt For:  Primary  General  Other (specify)  
 Aggregate Year-to-Date ▼ 250.00

Date of Receipt 01 / 21 / 2023  
**Transaction ID : SA11AI.7549**  
 Amount of Each Receipt this Period 250.00  
 Memo Item

<b>SUBTOTAL</b> of Receipts This Page (optional).....	5251.00
<b>TOTAL</b> 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: (check only one)	PAGE 8 OF 15
<input checked="" type="checkbox"/> 11a	<input type="checkbox"/> 11b	<input type="checkbox"/> 11c	<input type="checkbox"/> 12
<input type="checkbox"/> 13	<input type="checkbox"/> 14	<input type="checkbox"/> 15	<input type="checkbox"/> 16 <input type="checkbox"/> 17

Any information copied from such Reports and Statements may not be sold or used by any person for the purpose of soliciting contributions or for commercial purposes, other than using the name and address of any political committee to solicit contributions from such committee.

NAME OF COMMITTEE (In Full)  
**FINANCIAL PLANNING ASSOCIATION POLITICAL ACTION COMMITTEE**

**A. Kirchenbauer, Lisa, AK, ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 200 N. Glebe Rd.  
 City Arlington State VA Zip Code 22203  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) Omega Wealth Management Occupation (for Individual) President  
 Receipt For:  Primary  General  Other (specify) ▼  
 Aggregate Year-to-Date ▼ 500.00

Date of Receipt 06 / 13 / 2023  
**Transaction ID : SA11AI.7620**  
 Amount of Each Receipt this Period 500.00  
 Memo Item

**B. Kull, James, F., ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 4264 Westlake Dr  
 City Austin State TX Zip Code 78746  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) Cypress Wealth Occupation (for Individual) Financial Planner  
 Receipt For:  Primary  General  Other (specify) ▼  
 Aggregate Year-to-Date ▼ 250.00

Date of Receipt 02 / 03 / 2023  
**Transaction ID : SA11AI.7559**  
 Amount of Each Receipt this Period 250.00  
 Memo Item

**C. Lee, James, , ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 63 Putnam St Ste 202  
 City Saratoga Springs State NY Zip Code 12866  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) Lee Investment Management Occupation (for Individual) President  
 Receipt For:  Primary  General  Other (specify)  
 Aggregate Year-to-Date ▼ 1500.00

Date of Receipt 05 / 05 / 2023  
**Transaction ID : SA11AI.7586**  
 Amount of Each Receipt this Period 1500.00  
 Memo Item

<b>SUBTOTAL</b> of Receipts This Page (optional).....	2250.00
<b>TOTAL</b> 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: (check only one)	PAGE 9 OF 15
	<input checked="" type="checkbox"/> 11a <input type="checkbox"/> 13	<input type="checkbox"/> 11b <input type="checkbox"/> 14

<input type="checkbox"/> 12	<input type="checkbox"/> 16	<input type="checkbox"/> 17
-----------------------------	-----------------------------	-----------------------------

Any information copied from such Reports and Statements may not be sold or used by any person for the purpose of soliciting contributions or for commercial purposes, other than using the name and address of any political committee to solicit contributions from such committee.

NAME OF COMMITTEE (In Full)  
**FINANCIAL PLANNING ASSOCIATION POLITICAL ACTION COMMITTEE**

**A. Lee, James, , ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 63 Putnam St  
 Ste 202  
 City Saratoga Springs State NY Zip Code 12866  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) Lee Investment Management Occupation (for Individual) President  
 Receipt For:  Primary  General  Other (specify) ▼  
 Aggregate Year-to-Date ▼ 3000.00

Date of Receipt 06 / 15 / 2023  
**Transaction ID : SA11AI.7614**  
 Amount of Each Receipt this Period 1500.00  
 Memo Item

**B. Mahoney, Patrick, , ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 909 Bannock Street  
 Apt. 1233  
 City Denver State CO Zip Code 80204  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) Financial Planning Association Occupation (for Individual) Interim CEO  
 Receipt For:  Primary  General  Other (specify) ▼  
 Aggregate Year-to-Date ▼ 5000.00

Date of Receipt 05 / 11 / 2023  
**Transaction ID : SA11AI.7590**  
 Amount of Each Receipt this Period 5000.00  
 Memo Item

**C. Moore, Dennis, , ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 8117 Preston Rd, Ste 700  
 City Dallas State TX Zip Code 75225  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) Quest Advisors Occupation (for Individual) Financial Advisor  
 Receipt For:  Primary  General  Other (specify)  
 Aggregate Year-to-Date ▼ 5000.00

Date of Receipt 06 / 21 / 2023  
**Transaction ID : SA11AI.7615**  
 Amount of Each Receipt this Period 5000.00  
 Memo Item

<b>SUBTOTAL</b> of Receipts This Page (optional).....	11500.00
<b>TOTAL</b> 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: (check only one)	PAGE 10 OF 15
<input checked="" type="checkbox"/> 11a	<input type="checkbox"/> 11b	<input type="checkbox"/> 11c	<input type="checkbox"/> 12
<input type="checkbox"/> 13	<input type="checkbox"/> 14	<input type="checkbox"/> 15	<input type="checkbox"/> 16 <input type="checkbox"/> 17

Any information copied from such Reports and Statements may not be sold or used by any person for the purpose of soliciting contributions or for commercial purposes, other than using the name and address of any political committee to solicit contributions from such committee.

NAME OF COMMITTEE (In Full)  
**FINANCIAL PLANNING ASSOCIATION POLITICAL ACTION COMMITTEE**

**A. Nardone, Laurie, , ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 100 Larkspur Landing Ste 203  
 City Larkspur State CA Zip Code 94939  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) Shira Ridge Wealth Management Occupation (for Individual) Managing Principal  
 Receipt For:  Primary  General  Other (specify) ▼  
 Aggregate Year-to-Date ▼ 500.00

Date of Receipt 02 / 09 / 2023  
**Transaction ID : SA11AI.7562**  
 Amount of Each Receipt this Period 500.00  
 Memo Item

**B. Nicolette, Nicholas, A, ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 60 Blue Heron Rd  
 City Sparta State NJ Zip Code 07871  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) Sterling Financial Group Occupation (for Individual) Founder/Principal/CFP  
 Receipt For:  Primary  General  Other (specify) ▼  
 Aggregate Year-to-Date ▼ 500.00

Date of Receipt 05 / 03 / 2023  
**Transaction ID : SA11AI.7585**  
 Amount of Each Receipt this Period 500.00  
 Memo Item

**C. Pare, Frank, , ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 1970 Broadway Ste 525  
 City Oakland State CA Zip Code 94612  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) PF Wealth Management Group Occupation (for Individual) President/Certified Financial Planner  
 Receipt For:  Primary  General  Other (specify)  
 Aggregate Year-to-Date ▼ 2589.00

Date of Receipt 05 / 16 / 2023  
**Transaction ID : SA11AI.7591**  
 Amount of Each Receipt this Period 2589.00  
 Memo Item

<b>SUBTOTAL</b> of Receipts This Page (optional).....	3589.00
<b>TOTAL</b> 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: (check only one)	PAGE 11 OF 15
<input checked="" type="checkbox"/> 11a	<input type="checkbox"/> 11b	<input type="checkbox"/> 11c	<input type="checkbox"/> 12
<input type="checkbox"/> 13	<input type="checkbox"/> 14	<input type="checkbox"/> 15	<input type="checkbox"/> 16 <input type="checkbox"/> 17

Any information copied from such Reports and Statements may not be sold or used by any person for the purpose of soliciting contributions or for commercial purposes, other than using the name and address of any political committee to solicit contributions from such committee.

NAME OF COMMITTEE (In Full)  
**FINANCIAL PLANNING ASSOCIATION POLITICAL ACTION COMMITTEE**

**A. Pike, Shannon, J., ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 2101 Highland Avenue South  
 Suite 300  
 City Birmingham State AL Zip Code 35205  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) Kassouf & Co. Occupation (for Individual) Principal  
 Receipt For:  Primary  General  Other (specify) ▼  
 Aggregate Year-to-Date ▼ 1500.00

Date of Receipt 06 / 13 / 2023  
**Transaction ID : SA11AI.7616**  
 Amount of Each Receipt this Period 1500.00  
 Memo Item

**B. Prendergast, Mark, L., ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 5011 Argosy Ave.  
 Suite 7  
 City Huntington Beach State CA Zip Code 92649  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) Inspired Financial Occupation (for Individual) Director of Tax Strategies  
 Receipt For:  Primary  General  Other (specify) ▼  
 Aggregate Year-to-Date ▼ 1300.00

Date of Receipt 02 / 09 / 2023  
**Transaction ID : SA11AI.7563**  
 Amount of Each Receipt this Period 1300.00  
 Memo Item

**C. Schweiss, Skip, , ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 717 17th St  
 Ste 1800  
 City Denver State CO Zip Code 80202  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) TD Ameritrade Institutional Occupation (for Individual) Managing Director  
 Receipt For:  Primary  General  Other (specify)  
 Aggregate Year-to-Date ▼ 5000.00

Date of Receipt 02 / 08 / 2023  
**Transaction ID : SA11AI.7561**  
 Amount of Each Receipt this Period 5000.00  
 Memo Item

<b>SUBTOTAL</b> of Receipts This Page (optional).....	7800.00
<b>TOTAL</b> 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: (check only one)	PAGE 12 OF 15
<input checked="" type="checkbox"/> 11a	<input type="checkbox"/> 11b	<input type="checkbox"/> 11c	<input type="checkbox"/> 12
<input type="checkbox"/> 13	<input type="checkbox"/> 14	<input type="checkbox"/> 15	<input type="checkbox"/> 16 <input type="checkbox"/> 17

Any information copied from such Reports and Statements may not be sold or used by any person for the purpose of soliciting contributions or for commercial purposes, other than using the name and address of any political committee to solicit contributions from such committee.

NAME OF COMMITTEE (In Full)  
**FINANCIAL PLANNING ASSOCIATION POLITICAL ACTION COMMITTEE**

**A. Sestok, Byrke, J., ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 440 Mamaroneck Ave.  
 Suite N403  
 City Harrison State NY Zip Code 10528  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) Rightirement Wealth Partners Occupation (for Individual) Financial Planner  
 Receipt For:  Primary  General  Other (specify) ▼  
 Aggregate Year-to-Date ▼ 500.00

Date of Receipt 06 / 13 / 2023  
**Transaction ID : SA11AI.7619**  
 Amount of Each Receipt this Period 500.00  
 Memo Item

**B. Yerger, Daniel, M., ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 402 Main St  
 City Longmont State CO Zip Code 80501  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) MY Wealth Planners Occupation (for Individual) Owner/Principal/CFP  
 Receipt For:  Primary  General  Other (specify) ▼  
 Aggregate Year-to-Date ▼ 1000.00

Date of Receipt 05 / 03 / 2023  
**Transaction ID : SA11AI.7584**  
 Amount of Each Receipt this Period 1000.00  
 Memo Item

**C. Zohlen, Evelyn, M., ,**  
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name  
 Mailing Address 5011 Argosy Ave.  
 Ste 7  
 City Huntington Beach State CA Zip Code 92649  
 FEC ID number of contributing federal political committee. **C**  
 Name of Employer (for Individual) Inspired Financial Occupation (for Individual) President  
 Receipt For:  Primary  General  Other (specify)  
 Aggregate Year-to-Date ▼ 5000.00

Date of Receipt 02 / 09 / 2023  
**Transaction ID : SA11AI.7564**  
 Amount of Each Receipt this Period 5000.00  
 Memo Item

<b>SUBTOTAL</b> of Receipts This Page (optional).....	6500.00
<b>TOTAL</b> This Period (last page this line number only).....	40890.00

**SCHEDULE B (FEC Form 3X)  
ITEMIZED DISBURSEMENTS**

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

FOR LINE NUMBER:  
(check only one)

<input checked="" type="checkbox"/> 21b	<input type="checkbox"/> 22	<input type="checkbox"/> 23	<input type="checkbox"/> 26	<input type="checkbox"/> 27
<input type="checkbox"/> 28a	<input type="checkbox"/> 28b	<input type="checkbox"/> 28c	<input type="checkbox"/> 29	<input type="checkbox"/> 30b

Any information copied from such Reports and Statements may not be sold or used by any person for the purpose of soliciting contributions or for commercial purposes, other than using the name and address of any political committee to solicit contributions from such committee.

NAME OF COMMITTEE (In Full)

**FINANCIAL PLANNING ASSOCIATION POLITICAL ACTION COMMITTEE**

Full Name (Last, First, Middle Initial)

**A. Katz Compliance, LLC**

Mailing Address PO Box 33079

City  
Washington

State  
DC

Zip Code  
20033-0079

Purpose of Disbursement  
Compliance Services

Candidate Name

Office Sought:  House  
 Senate  
 President

Disbursement For:  
 Primary  General  
 Other (specify) ▼

State: District:

Date of Disbursement

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

FEC Identification Number

**C**

**Transaction ID : SB21B.7605**

Amount of Each Disbursement this Period

2600.00

Memo Item

Full Name (Last, First, Middle Initial)

**B. Katz Compliance, LLC**

Mailing Address PO Box 33079

City  
Washington

State  
DC

Zip Code  
20033-0079

Purpose of Disbursement  
Compliance Services

Candidate Name

Office Sought:  House  
 Senate  
 President

Disbursement For:  
 Primary  General  
 Other (specify) ▼

State: District:

Date of Disbursement

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

FEC Identification Number

**C**

**Transaction ID : SB21B.7606**

Amount of Each Disbursement this Period

650.00

Memo Item

Full Name (Last, First, Middle Initial)

**C. Katz Compliance, LLC**

Mailing Address PO Box 33079

City  
Washington

State  
DC

Zip Code  
20033-0079

Purpose of Disbursement  
Compliance Services

Candidate Name

Office Sought:  House  
 Senate  
 President

Disbursement For:  
 Primary  General  
 Other (specify) ▼

State: District:

Date of Disbursement

M	M	/	D	D	/	Y	Y	Y	Y
0	4		1	2		2	0	2	3

FEC Identification Number

**C**

**Transaction ID : SB21B.7607**

Amount of Each Disbursement this Period

650.00

Memo Item

**SUBTOTAL** of Disbursements This Page (optional)..... ▶

3900.00

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

**SCHEDULE B (FEC Form 3X)  
ITEMIZED DISBURSEMENTS**

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

FOR LINE NUMBER:  
(check only one)

<input checked="" type="checkbox"/> 21b	<input type="checkbox"/> 22	<input type="checkbox"/> 23	<input type="checkbox"/> 26	<input type="checkbox"/> 27
<input type="checkbox"/> 28a	<input type="checkbox"/> 28b	<input type="checkbox"/> 28c	<input type="checkbox"/> 29	<input type="checkbox"/> 30b

Any information copied from such Reports and Statements may not be sold or used by any person for the purpose of soliciting contributions or for commercial purposes, other than using the name and address of any political committee to solicit contributions from such committee.

NAME OF COMMITTEE (In Full)

**FINANCIAL PLANNING ASSOCIATION POLITICAL ACTION COMMITTEE**

Full Name (Last, First, Middle Initial)

**A. Katz Compliance, LLC**

Mailing Address PO Box 33079

City  
Washington

State  
DC

Zip Code  
20033-0079

Purpose of Disbursement  
Compliance Services

Candidate Name

Office Sought:  House  
 Senate  
 President

State: District:

Disbursement For:  
 Primary  General  
 Other (specify) ▼

Category/  
Type

Date of Disbursement

M M M	/	D D D	/	Y Y Y Y Y
05		09		2023

FEC Identification Number

C

**Transaction ID : SB21B.7608**

Amount of Each Disbursement this Period

650.00

Memo Item

Full Name (Last, First, Middle Initial)

**B. Katz Compliance, LLC**

Mailing Address PO Box 33079

City  
Washington

State  
DC

Zip Code  
20033-0079

Purpose of Disbursement  
Compliance Services

Candidate Name

Office Sought:  House  
 Senate  
 President

State: District:

Disbursement For:  
 Primary  General  
 Other (specify) ▼

Category/  
Type

Date of Disbursement

M M M	/	D D D	/	Y Y Y Y Y
05		31		2023

FEC Identification Number

C

**Transaction ID : SB21B.7603**

Amount of Each Disbursement this Period

700.00

Memo Item

Full Name (Last, First, Middle Initial)

**C. Katz Compliance, LLC**

Mailing Address PO Box 33079

City  
Washington

State  
DC

Zip Code  
20033-0079

Purpose of Disbursement  
Compliance Services

Candidate Name

Office Sought:  House  
 Senate  
 President

State: District:

Disbursement For:  
 Primary  General  
 Other (specify) ▼

Category/  
Type

Date of Disbursement

M M M	/	D D D	/	Y Y Y Y Y
05		31		2023

FEC Identification Number

C

**Transaction ID : SB21B.7604**

Amount of Each Disbursement this Period

650.00

Memo Item

**SUBTOTAL** of Disbursements This Page (optional)..... ▶

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

2000.00

**SCHEDULE B (FEC Form 3X)  
ITEMIZED DISBURSEMENTS**

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

FOR LINE NUMBER:  
(check only one)

<input checked="" type="checkbox"/> 21b	<input type="checkbox"/> 22	<input type="checkbox"/> 23	<input type="checkbox"/> 26	<input type="checkbox"/> 27
<input type="checkbox"/> 28a	<input type="checkbox"/> 28b	<input type="checkbox"/> 28c	<input type="checkbox"/> 29	<input type="checkbox"/> 30b

Any information copied from such Reports and Statements may not be sold or used by any person for the purpose of soliciting contributions or for commercial purposes, other than using the name and address of any political committee to solicit contributions from such committee.

NAME OF COMMITTEE (In Full)

**FINANCIAL PLANNING ASSOCIATION POLITICAL ACTION COMMITTEE**

Full Name (Last, First, Middle Initial)

**A. Katz Compliance, LLC**

Mailing Address PO Box 33079

City  
Washington

State  
DC

Zip Code  
20033-0079

Purpose of Disbursement  
Compliance Services

Candidate Name

Office Sought:  House  
 Senate  
 President

Disbursement For:  Primary  General  
 Other (specify) ▼

State: District:

Date of Disbursement

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

FEC Identification Number

**C**

**Transaction ID : SB21B.7624**

Amount of Each Disbursement this Period

650.00

Memo Item

Full Name (Last, First, Middle Initial)

**B. Zohlen, Evelyn, M., ,**

Mailing Address 5011 Argosy Ave.  
Ste 7

City  
Huntington Beach

State  
CA

Zip Code  
92649

Purpose of Disbursement  
Reimbursement-PAC Board Gifts

Candidate Name

Office Sought:  House  
 Senate  
 President

Disbursement For:  Primary  General  
 Other (specify)

State: District:

Date of Disbursement

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

FEC Identification Number

**C**

**Transaction ID : SB21B.7597**

Amount of Each Disbursement this Period

379.86

Memo Item

Full Name (Last, First, Middle Initial)

**C. HappyHygeeGifts, Inc.**

Mailing Address 3093 Broadway  
Unit PH79

City  
Oakland

State  
CA

Zip Code  
94611

Purpose of Disbursement  
PAC Board Gifts

Candidate Name

Office Sought:  House  
 Senate  
 President

Disbursement For:  Primary  General  
 Other (specify) ▼

State: District:

Date of Disbursement

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

FEC Identification Number

**C**

**Transaction ID : SB21B.7597.**

Amount of Each Disbursement this Period

333.88

Memo Item

**SUBTOTAL** of Disbursements This Page (optional)..... ▶

<input type="text"/>	1029.86
----------------------	---------

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

<input type="text"/>	6929.86
----------------------	---------