

**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 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 Y Y

in the State of

5. Covering Period

M M M /

D D D /

Y Y Y Y Y Y Y Y

through

M M M /

D D D /

Y Y Y Y Y Y Y Y

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 Y Y

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
07 / 01 / 2015 To: M M / D D / Y Y Y Y Y Y
07 / 31 / 2015

	COLUMN A This Period	COLUMN B Calendar Year-to-Date
6. (a) Cash on Hand January 1, Y Y Y Y Y Y 2015		151013.12
(b) Cash on Hand at Beginning of Reporting Period.....	159896.59	
(c) Total Receipts (from Line 19)	4450.00	45441.99
(d) Subtotal (add Lines 6(b) and 6(c) for Column A and Lines 6(a) and 6(c) for Column B).....	164346.59	196455.11
7. Total Disbursements (from Line 31)	32550.84	64659.36
8. Cash on Hand at Close of Reporting Period (subtract Line 7 from Line 6(d))	131795.75	131795.75
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	7		0	1		2	0	1	5

To:

M	M	/	D	D	/	Y	Y	Y	Y
0	7		3	1		2	0	1	5

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).....

4450.00

42389.00

(ii) Unitemized

0.00

1602.99

(iii) TOTAL (add

Lines 11(a)(i) and (ii)..... ▶

4450.00

44941.99

(b) Political Party Committees

0.00

0.00

(c) Other Political Committees

(such as PACs).....

0.00

500.00

(d) Total Contributions (add Lines

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

Totals to Line 33, page 5)

4450.00

45441.99

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))..... ▶

4450.00

45441.99

20. Total Federal Receipts

(subtract Line 18(c) from Line 19)

4450.00

45441.99

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	50.84	1159.36
(c) Total Operating Expenditures (add 21(a)(i), (a)(ii), and (b))	50.84	1159.36
22. Transfers to Affiliated/Other Party Committees.....	0.00	0.00
23. Contributions to Federal Candidates/Committees and Other Political Committees.....	32500.00	63500.00
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)) ..	32550.84	64659.36
32. Total Federal Disbursements (subtract Line 21(a)(ii) and Line 30(a)(ii) from Line 31).....	32550.84	64659.36

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)	4450.00	45441.99
34. Total Contribution Refunds (from Line 28(d))	0.00	0.00
35. Net Contributions (other than loans) (subtract Line 34 from Line 33)	4450.00	45441.99
36. Total Federal Operating Expenditures (add Line 21(a)(i) and Line 21(b)) ►	50.84	1159.36
37. Offsets to Operating Expenditures (from Line 15, page 3).....	0.00	0.00
38. Net Operating Expenditures (subtract Line 37 from Line 36) ►	50.84	1159.36

SCHEDULE A (FEC Form 3X)
ITEMIZED RECEIPTSUse separate schedule(s)
for each category of the
Detailed Summary PageFOR LINE NUMBER: PAGE 6 OF 14
(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. Hal Anderson

Mailing Address 881 Escalante Dr

City

Saint George

State

UT

Zip Code

84790-7609

FEC ID number of contributing
federal political committee.

C

Name of Employer

Soltis Investment Advisors

Occupation

Financial Advisor

Receipt For: 2015

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M	M	/	D	D	/	Y	Y	Y	Y
0	7		1	8		2	0	1	5

Transaction ID : C3068361

Amount of Each Receipt this Period

500.00

Full Name (Last, First, Middle Initial)

B. Kim Anderson

Mailing Address 20 North Main

City

Saint George

State

UT

Zip Code

84770-5601

FEC ID number of contributing
federal political committee.

C

Name of Employer

Soltis Investment Advisors

Occupation

VICE PRESIDENT

Receipt For: 2015

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M	M	/	D	D	/	Y	Y	Y	Y
0	7		1	8		2	0	1	5

Transaction ID : C3068364

Amount of Each Receipt this Period

500.00

Full Name (Last, First, Middle Initial)

C. Osmundo Bernabe

Mailing Address 1 Moody Plz

City

Galveston

State

TX

Zip Code

77550-7947

FEC ID number of contributing
federal political committee.

C

Name of Employer

American National Insurance Company

Occupation

ACTUARY

Receipt For: 2015

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M	M	/	D	D	/	Y	Y	Y	Y
0	7		1	8		2	0	1	5

Transaction ID : C3068362

Amount of Each Receipt this Period

500.00

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

1500.00

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 7 OF 14
(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. Steve Dimitriou

Mailing Address 100 Franklin Street 7th Floor

City State Zip Code
 Boston MA 02110-1538

FEC ID number of contributing
federal political committee.

C

Name of Employer
 Mayflower Advisors, LLC

Occupation
 INVESTMENT ADVISOR

Receipt For: 2015

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

1250.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
 07 21 2015

Transaction ID : C3068366

Amount of Each Receipt this Period

500.00

Full Name (Last, First, Middle Initial)

B. Don Fry

Mailing Address 333 N Greene St Ste 403

City State Zip Code
 Greensboro NC 27401-2184

FEC ID number of contributing
federal political committee.

C

Name of Employer
 Fry Financial Consultants, Inc.

Occupation
 PRESIDENT

Receipt For: 2015

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
 07 31 2015

Transaction ID : C3068356

Amount of Each Receipt this Period

500.00

Full Name (Last, First, Middle Initial)

C. David Gelman

Mailing Address 70 W 40th St Fl 8

City State Zip Code
 New York NY 10018-2623

FEC ID number of contributing
federal political committee.

C

Name of Employer
 Gelman Pension Consulting, Inc.

Occupation
 PRESIDENT

Receipt For: 2015

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

500.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
 07 31 2015

Transaction ID : C3068359

Amount of Each Receipt this Period

500.00

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

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

1500.00

SCHEDULE A (FEC Form 3X)
ITEMIZED RECEIPTSUse separate schedule(s)
for each category of the
Detailed Summary PageFOR LINE NUMBER: PAGE 8 OF 14
(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. Kenneth HoffmanMailing Address 505 5th Ave
FI 14

City	State	Zip Code
New York	NY	10017-4919

FEC ID number of contributing
federal political committee.

C

Name of Employer

High Tower Advisors

Occupation

Information Requested

Receipt For: 2015

☒ 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
07	/	15	/	2015

Transaction ID : C3068360

Amount of Each Receipt this Period

500.00

Full Name (Last, First, Middle Initial)

B. Gary Kleinschmidt

Mailing Address 100 Stamford PI FI 5

City	State	Zip Code
Stamford	CT	06902-6740

FEC ID number of contributing
federal political committee.

C

Name of Employer

Legg Mason

Occupation

VICE PRESIDENT

Receipt For: 2015

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

750.00

Date of Receipt

M M M	/	D D D	/	Y Y Y Y Y Y
07	/	21	/	2015

Transaction ID : C3068365

Amount of Each Receipt this Period

500.00

Full Name (Last, First, Middle Initial)

C. Sal Tripodi

Mailing Address 1550 Larimer St. #423

City	State	Zip Code
Denver	CO	80202

FEC ID number of contributing
federal political committee.

C

Name of Employer

TRI Pension Services

Occupation

PRESIDENT

Receipt For: 2015

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

700.00

Date of Receipt

M M M	/	D D D	/	Y Y Y Y Y Y
07	/	31	/	2015

Transaction ID : C3068357

Amount of Each Receipt this Period

100.00

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

1100.00

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 9 OF 14
(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. Sal Tripodi

Mailing Address 1550 Larimer St. #423

City State Zip Code
 Denver CO 80202

FEC ID number of contributing
federal political committee.

C

Name of Employer

TRI Pension Services

Occupation

PRESIDENT

Receipt For: 2015

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

700.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
 07 31 2015

Transaction ID : C3068358

Amount of Each Receipt this Period

100.00

Full Name (Last, First, Middle Initial)

B. Lynn Young

Mailing Address 4835 E Cactus Rd Ste 260

City State Zip Code
 Scottsdale AZ 85254-4198

FEC ID number of contributing
federal political committee.

C

Name of Employer

Coble Pension Group, LLC

Occupation

VICE PRESIDENT

Receipt For: 2015

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

875.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
 07 31 2015

Transaction ID : C3068354

Amount of Each Receipt this Period

125.00

Full Name (Last, First, Middle Initial)

C. Lynn Young

Mailing Address 4835 E Cactus Rd Ste 260

City State Zip Code
 Scottsdale AZ 85254-4198

FEC ID number of contributing
federal political committee.

C

Name of Employer

Coble Pension Group, LLC

Occupation

VICE PRESIDENT

Receipt For: 2015

☒ Primary ☐ General
☐ Other (specify) ▼

Aggregate Year-to-Date ▼

875.00

Date of Receipt

M M / D D / Y Y Y Y Y Y
 07 31 2015

Transaction ID : C3068355

Amount of Each Receipt this Period

125.00

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

350.00

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

4450.00

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

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

Category/
Type

22.13

Category/
Type

0.64

Category/
Type

1.56

24.33

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 PageFOR LINE NUMBER:
(check only one)

PAGE 11 OF 14

☒ 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		D	D		Y	Y	Y	Y	Y	Y
0	7			1	0	2015					

Mailing Address Post Office Box 85024

City	State	Zip Code
Richmond	VA	23285-5024

Transaction ID : D167824

Purpose of Disbursement
Credit Card/ Accounting Fees

Amount of Each Disbursement this Period

Candidate Name

26.51											

Office Sought:	☐ House
	☐ Senate
	☐ President

Disbursement For: 2015
☒ Primary ☐ General
☐ Other (specify) ▼

State: District:

Full Name (Last, First, Middle Initial)

B.

Date of Disbursement

M	M		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

Office Sought:	☐ House
	☐ Senate
	☐ President

Disbursement For:
☐ Primary ☐ General
☐ Other (specify) ▼

State: District:

Full Name (Last, First, Middle Initial)

C.

Date of Disbursement

M	M		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

Office Sought:	☐ House
	☐ Senate
	☐ President

Disbursement For:
☐ Primary ☐ General
☐ Other (specify) ▼

State: District:

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

26.51											

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

50.84											

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

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

PAGE 13 OF 14

☐ 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. National Republican Congressional Committee

Date of Disbursement

M M M	/	D D D	/	Y Y Y Y Y Y
07	/	24	/	2015

Mailing Address 320 First Street

Transaction ID : D167817

City	State	Zip Code
Washington	DC	20003

Amount of Each Disbursement this Period

Purpose of Disbursement
PAC ContributionCategory/
Type

15000.00

Candidate Name

Office Sought:	☐ House
	☐ Senate
	☐ President

Disbursement For:	☐ Primary	☐ General
	☐ Other (specify) ▼	

State: District:

Full Name (Last, First, Middle Initial)

B. FRIENDS OF JOHN BOEHNER

Date of Disbursement

M M M	/	D D D	/	Y Y Y Y Y Y
07	/	24	/	2015

Mailing Address 7908 CINCINNATI DAYTON ROAD

Transaction ID : D167816

Amount of Each Disbursement this Period

City	State	Zip Code
WEST CHESTER	OH	45069

Purpose of Disbursement
Candidate contributionCategory/
Type

5000.00

Candidate Name

Rep. John A. Boehner

Office Sought:	☒ House
	☐ Senate
	☐ President

Disbursement For:	2015	☒ Primary	☐ General
		☐ Other (specify) ▼	

State: OH District: 08

Full Name (Last, First, Middle Initial)

C. BOB CASEY FOR SENATE INC

Date of Disbursement

M M M	/	D D D	/	Y Y Y Y Y Y
07	/	29	/	2015

Mailing Address PO BOX 58746

Transaction ID : D167829

Amount of Each Disbursement this Period

City	State	Zip Code
PHILADELPHIA	PA	19102

Purpose of Disbursement
Candidate ContributionCategory/
Type

1000.00

Candidate Name

Sen. Bob Casey

Office Sought:	☐ House
	☒ Senate
	☐ President

Disbursement For:	2018	☒ Primary	☐ General
		☐ Other (specify) ▼	

State: PA District: 00

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

21000.00

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

32500.00