**FEC FORM 3X**

# REPORT OF RECEIPTS AND DISBURSEMENTS

**For Other Than An Authorized Committee**

Office Use Only

1. NAME OF COMMITTEE (in full) — **USE FEC MAILING LABEL OR TYPE OR PRINT** ▼ — Example: If typing, type over the lines

National Association of Insurance and Financial Advisors Political Action Committee

ADDRESS (number and street) ▼ 2901 Telestar Court

Check if different than previously reported. (ACC)

Falls Church | VA | 22042 –

2. **FEC IDENTIFICATION NUMBER** ▼ C00005249

CITY ▲ STATE ▲ ZIPCODE ▲

3. IS THIS REPORT X 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 Quarterly Report(YE)

July 31 Mid-Year Report(Non-election Year Only) (MY)

Termination Report (TER)

(b) Monthly Report Due On: X

| | | | |
|---|---|---|---|
| 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 (M13) |

(c) 12-Day **PRE**-Election Report for the: Primary (12P) General (12G) Runoff (12R) Convention (12C) Special (12G)

Election on in the State of

(d) 30-Day **P**ost -Election Report for the: General (30G) Runoff (30R) Special (30S)

Election on in the State of

5. Covering Period 01 01 2003 through 01 31 2003

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 Mr. Peter C. Browne

Signature of Treasurer Electronically Filed by Mr. Peter C. Browne Date 02 20 2003

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** (Revised 1/2001) |
|---|---|---|---|

# SUMMARY PAGE
## OF RECEIPTS AND DISBURSEMENTS

FEC **Form 3X** (Revised 1/2001)



Write or Type Committee Name

National Association of Insurance and Financial Advisors Political Action Committee

Report Covering the Period: From: 01 01 2003 To: 01 31 2003

| | COLUMN A<br>This Period | COLUMN B<br>Calendar Year-to-Date |
|---|---|---|
| 6. (a) Cash on Hand January 1 2003 | | .00 |
| (b) Cash on Hand at Begining of Reporting Period ..... | 308698.44 | |
| (c) Total Receipts (from Line 19) ..... | 68872.60 | 68872.60 |
| (d) Subtotal (add lines 6(b) and 6(c) for Column A and Lines 6(a) and 6(c) for Column B) ..... | 377571.04 | 68872.60 |
| 7. Total Disbursements (from Line 30) ..... | 9225.00 | 9225.00 |
| 8. Cash on Hand at Close of Reporting Period (subtract Line 7 from Line 6(d)) ..... | 368346.04 | 59647.60 |
| 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 | |

X 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

National Association of Insurance and Financial Advisors Political Action Committee

Report Covering the Period: From: 01 01 2003 To: 01 31 2003

| 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) ..... | 13320.63 | |
| (ii) Unitemized ..... | 55551.97 | |
| (iii) TOTAL (add Lines 11(a)(i) and (ii) ..... ▶ | 68872.60 | 68872.60 |
| (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 32, page 4) ..... ▶ | 68872.60 | 68872.60 |
| 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 36, page 4) ..... | 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 Nonfederal Account for Joint Activity ..... | 0.00 | 0.00 |
| 19. Total Receipts (add Lines 11(d), 12, 13, 14, 15, 16, 17, and 18) ..... ▶ | 68872.60 | 68872.60 |
| 20. Total Federal Receipts (subtract Line 18 from Line 19) ..... ▶ | 68872.60 | 68872.60 |

# DETAILED SUMMARY PAGE
of Disbursements

FEC Form 3X (Revised 1/2001)



| II. DISBURSEMENTS | COLUMN A Total This Period | COLUMN B Calendar Year-to-Date |
|---|---|---|
| 21. Operating Expenditures: | | |
| (a) Shared 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 | 0.00 | 0.00 |
| (c) Total Operating Expenditures (add 21(a)(i), (a)(ii) and (b)) ▶ | 0.00 | 0.00 |
| 22. Transfers to Affiliated/Other Party Committees | 0.00 | 0.00 |
| 23. Contributions to Federal Candidates/Committees and Other Political Committees | 8000.00 | 8000.00 |
| 24. Independent Expenditure (use Schedule E) | 0.00 | 0.00 |
| 25. Coordinated Expenditures Made by Party Committees (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 | 1225.00 | 1225.00 |
| (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)) ▶ | 1225.00 | 1225.00 |
| 29. Other Disbursements | 0.00 | 0.00 |
| 30. Total Disbursements (add Lines 21(c), 22, 23,24,25,26,27,28(d),and 29) ▶ | 9225.00 | 9225.00 |
| 31. Total Federal Disbursements (subtract Line 21(a)(ii) from Line 30) ▶ | 9225.00 | 9225.00 |
| **III. Net Contributions/Operating Expenditures** | | |
| 32. Total Contributions (other than loans) from Line 11(d), page 3) | 68872.60 | 68872.60 |
| 33. Total Contribution Refunds (from Line 28(d)) | 1225.00 | 1225.00 |
| 34. Net Contributions (other than loans) (subtract Line 33 from Line 32) | 67647.60 | 67647.60 |
| 35. Total Federal Operating Expenditures (add Line 21(a)(i) and Line 21(b)) ▶ | 0.00 | 0.00 |
| 36. Offsets to Operating Expenditures (from Line 15, page 3) | 0.00 | 0.00 |
| 37. Net Operating Expenditures (subtract Line 36 from Line 35) ▶ | 0.00 | 0.00 |

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

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

FOR LINE NUMBER: (check only one) PAGE 5 / 18

[X] 11a [ ] 11b [ ] 11c [ ] 12 [ ] 13 [ ] 14 [ ] 15 [ ] 16 [ ] 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)
National Association of Insurance and Financial Advisors Political Action Committee

**A.**
Full Name (Last, First, Middle Initial): Mr. Guy E. Baker, CLU, MSFS
Mailing Address: 30172 Branding Iron Rd
City: San Juan Capo | State: CA | Zip Code: 92675-1501
FEC ID number of contributing federal political committee.
Name of Employer: BTA Advisory Group
Occupation: Insurance Agent
Receipt For: Primary General
Other (specify) ▼
Aggregate Year-to-Date ▼ 500.00
Date of Receipt: 01 21 2003
Amount of Each Receipt this Period: 500.00
Check
Transaction ID: R1368349

**B.**
Full Name (Last, First, Middle Initial): Mr. James M. Benson, CLU
Mailing Address: 63 Winsor Way
City: Weston | State: MA | Zip Code: 02193-2538
FEC ID number of contributing federal political committee.
Name of Employer: NAIFA
Occupation: CEO
Receipt For: Primary General
Other (specify) ▼
Aggregate Year-to-Date ▼ 500.00
Date of Receipt: 01 02 2003
Amount of Each Receipt this Period: 500.00
Check
Transaction ID: R1367947

**C.**
Full Name (Last, First, Middle Initial): Mr. Lawrence Brody, JD, LLM
Mailing Address: 17 Fielding Road
City: St. Louis | State: MO | Zip Code: 63124-1306
FEC ID number of contributing federal political committee.
Name of Employer: Bryan, Cave LLP
Occupation: Insurance Agent
Receipt For: Primary General
Other (specify) ▼
Aggregate Year-to-Date ▼ 600.00
Date of Receipt: 01 07 2003
Amount of Each Receipt this Period: 600.00
Check
Transaction ID: R1368208

**SUBTOTAL** of Receipts This Page (optional) ..... ▶ **1600.00**

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

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

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

FOR LINE NUMBER: (check only one) PAGE 6 / 18

[X] 11a [ ] 11b [ ] 11c [ ] 12 [ ] 13 [ ] 14 [ ] 15 [ ] 16 [ ] 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)
National Association of Insurance and Financial Advisors Political Action Committee

**A.** Full Name (Last, First, Middle Initial): Mr. David F. Byers
Mailing Address: 2 Metroplex Drive #111
City: Birmingham State: AL Zip Code: 35209
FEC ID number of contributing federal political committee.
Name of Employer: Capital Strategies Group
Occupation: Insurance Agent
Receipt For: Primary General
Other (specify) ▼
Aggregate Year-to-Date ▼ 500.00
Date of Receipt: 01 06 2003
Amount of Each Receipt this Period: 500.00
Check
Transaction ID: R1368117

**B.** Full Name (Last, First, Middle Initial): Mr. John F. Carter, CLU, ChFC
Mailing Address: 3147 Ovenhill Rd
City: Bham State: AL Zip Code: 35223
FEC ID number of contributing federal political committee.
Name of Employer: Capital Strategies Group
Occupation: Insurance Agent
Receipt For: Primary General
Other (specify) ▼
Aggregate Year-to-Date ▼ 250.00
Date of Receipt: 01 06 2003
Amount of Each Receipt this Period: 250.00
Check
Transaction ID: R1368116

**C.** Full Name (Last, First, Middle Initial): Mr. Alexander A. Chemoff
Mailing Address: 351 Ridge Lane
City: Mill Neck State: NY Zip Code: 11765-1201
FEC ID number of contributing federal political committee.
Name of Employer: Chemoff Diamond & Co., LLC
Occupation: Partner
Receipt For: Primary General
Other (specify) ▼
Aggregate Year-to-Date ▼ 500.00
Date of Receipt: 01 02 2003
Amount of Each Receipt this Period: 500.00
Check
Transaction ID: R1367931

**SUBTOTAL** of Receipts This Page (optional) ..... ▶ **1250.00**

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

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

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

FOR LINE NUMBER: (check only one) PAGE 7 / 18

[X] 11a [ ] 11b [ ] 11c [ ] 12 [ ] 13 [ ] 14 [ ] 15 [ ] 16 [ ] 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)
National Association of Insurance and Financial Advisors Political Action Committee

**A.**
Full Name (Last, First, Middle Initial): Ms. Adelia C. Chung, CLU, ChFC
Mailing Address: 190 Dowsett Ave.
City: Honolulu State: HI Zip Code: 96817-1108
FEC ID number of contributing federal political committee.
Name of Employer: Chung Ins. & Investment Group
Occupation: General Agent
Receipt For: Primary General
Other (specify)
Aggregate Year-to-Date: 300.00
Date of Receipt: 01 13 2003
Amount of Each Receipt this Period: 300.00
Check
Transaction ID: R1368269

**B.**
Full Name (Last, First, Middle Initial): Mr. Robert H. Colyer, CLU, LUTCF
Mailing Address: 2401 Fairoak Ct
City: San Jose State: CA Zip Code: 95125
FEC ID number of contributing federal political committee.
Name of Employer: Principal Financial Group
Occupation: Insurance Agent
Receipt For: Primary General
Other (specify)
Aggregate Year-to-Date: 250.00
Date of Receipt: 01 22 2003
Amount of Each Receipt this Period: 250.00
Credit Card
Transaction ID: R1372103

**C.**
Full Name (Last, First, Middle Initial): Mr. Neil Dunemoor, CLU, ChFC, LUT
Mailing Address: 1960 Holiday Ave.
City: Green Bay State: WI Zip Code: 54304-3826
FEC ID number of contributing federal political committee.
Name of Employer: Prudential Financial
Occupation: Representative
Receipt For: Primary General
Other (specify)
Aggregate Year-to-Date: 202.63
Date of Receipt: 01 10 2003
Amount of Each Receipt this Period: 5.10
Payroll Deduction
Transaction ID: R1368059

**SUBTOTAL** of Receipts This Page (optional) ..... ▶ **555.10**

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

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

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

FOR LINE NUMBER: (check only one) PAGE 8 / 18

[X] 11a [ ] 11b [ ] 11c [ ] 12 [ ] 13 [ ] 14 [ ] 15 [ ] 16 [ ] 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)
National Association of Insurance and Financial Advisors Political Action Committee

**A.**
Full Name (Last, First, Middle Initial): Mr. Neil Dunsmoor, CLU, ChFC, LUT
Mailing Address: 1360 Holiday Ave.
City: Green Bay State: WI Zip Code: 54304-3828
FEC ID number of contributing federal political committee.
Name of Employer: Prudential Financial
Occupation: Representative
Receipt For: Primary General
Other (specify)
Aggregate Year-to-Date: 202.63
Date of Receipt: 01 30 2003
Amount of Each Receipt this Period: 197.53
Check
Transaction ID: R1372259

**B.**
Full Name (Last, First, Middle Initial): Mr. Brian G. Ellerman
Mailing Address: 2230 Beechwood Ave
City: Wilmette State: IL Zip Code: 60091-1508
FEC ID number of contributing federal political committee.
Name of Employer:
Occupation: General Agent
Receipt For: Primary General
Other (specify)
Aggregate Year-to-Date: 500.00
Date of Receipt: 01 10 2003
Amount of Each Receipt this Period: 500.00
Check
Transaction ID: R1368174

**C.**
Full Name (Last, First, Middle Initial): Mr. Michael J. Eskra, CLU, RHU
Mailing Address: 2716 Granada Avenue
City: Coral Gables State: FL Zip Code: 33134-5552
FEC ID number of contributing federal political committee.
Name of Employer: Eskra & Associates, Inc.
Occupation: Insurance Agent
Receipt For: Primary General
Other (specify)
Aggregate Year-to-Date: 250.00
Date of Receipt: 01 21 2003
Amount of Each Receipt this Period: 250.00
Check
Transaction ID: R1368362

**SUBTOTAL** of Receipts This Page (optional) ..... ▶ 947.53

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

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

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

FOR LINE NUMBER: (check only one) PAGE 9 / 18

[X] 11a [ ] 11b [ ] 11c [ ] 12 [ ] 13 [ ] 14 [ ] 15 [ ] 16 [ ] 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)
National Association of Insurance and Financial Advisors Political Action Committee

**A.**
Full Name (Last, First, Middle Initial): Mr. Marvin H. Feldman, CLU, ChFC
Mailing Address: 932 Midway Lane
City: East Liverpool State: OH Zip Code: 43920-1242
FEC ID number of contributing federal political committee.
Name of Employer: The Feldman Agency
Occupation: Partner
Receipt For: Primary General
Other (specify) ▼
Aggregate Year-to-Date ▼ 500.00
Date of Receipt: 01 09 2003
Amount of Each Receipt this Period: 500.00
Check
Transaction ID: R1368248

**B.**
Full Name (Last, First, Middle Initial): Mr. Neal H. Feldman, CLU, ChFC
Mailing Address: 411 Theodore Fremd Ave.
City: Rye State: NY Zip Code: 10580-1410
FEC ID number of contributing federal political committee.
Name of Employer: Prudential Select Brokerage
Occupation: Director of Brokerage
Receipt For: Primary General
Other (specify) ▼
Aggregate Year-to-Date ▼ 300.00
Date of Receipt: 01 21 2003
Amount of Each Receipt this Period: 300.00
Check
Transaction ID: R1368336

**C.**
Full Name (Last, First, Middle Initial): Mr. Larry G. Foster, Jr., CLU,CFBS,A
Mailing Address: 10 Windrock Way
City: Greensboro State: NC Zip Code: 27455
FEC ID number of contributing federal political committee.
Name of Employer: MassMutual Financial Group
Occupation: General Agent
Receipt For: Primary General
Other (specify) ▼
Aggregate Year-to-Date ▼ 330.00
Date of Receipt: 01 02 2003
Amount of Each Receipt this Period: 330.00
Check
Transaction ID: R1367922

**SUBTOTAL** of Receipts This Page (optional) ..... ▶ **1130.00**

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

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

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

FOR LINE NUMBER: (check only one) PAGE 10 / 18

[X] 11a [ ] 11b [ ] 11c [ ] 12 [ ] 13 [ ] 14 [ ] 15 [ ] 16 [ ] 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)
National Association of Insurance and Financial Advisors Political Action Committee

**A.**
Full Name (Last, First, Middle Initial): Mr. Terry K. Headley, LUTCF,LIC
Mailing Address: 20704 Meadow Ridge Dr.
City: Springfield State: NE Zip Code: 68059
FEC ID number of contributing federal political committee.
Name of Employer: The Principal Financial Group
Occupation: General Agent
Receipt For: Primary General
Other (specify) ▼
Aggregate Year-to-Date ▼ 208.00
Date of Receipt: 01 10 2003
Amount of Each Receipt this Period: 208.00
Payroll Deduction
Transaction ID: R1364887

**B.**
Full Name (Last, First, Middle Initial): Mr. Dean Raymond Kortge, CLU
Mailing Address: 5330 Nectar Way
City: Eugene State: OR Zip Code: 97405-4647
FEC ID number of contributing federal political committee.
Name of Employer: Pacific Benefit Consultants
Occupation: Insurance Agent
Receipt For: Primary General
Other (specify) ▼
Aggregate Year-to-Date ▼ 250.00
Date of Receipt: 01 06 2003
Amount of Each Receipt this Period: 125.00
Check
Transaction ID: R1368032

**C.**
Full Name (Last, First, Middle Initial): Mr. Dean Raymond Kortge, CLU
Mailing Address: 5330 Nectar Way
City: Eugene State: OR Zip Code: 97405-4647
FEC ID number of contributing federal political committee.
Name of Employer: Pacific Benefit Consultants
Occupation: Insurance Agent
Receipt For: Primary General
Other (specify) ▼
Aggregate Year-to-Date ▼ 250.00
Date of Receipt: 01 24 2003
Amount of Each Receipt this Period: 125.00
Check
Transaction ID: R1372125

**SUBTOTAL** of Receipts This Page (optional) ..... ▶ **458.00**

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

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

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

FOR LINE NUMBER: (check only one) PAGE 11 / 18

[X] 11a [ ] 11b [ ] 11c [ ] 12 [ ] 13 [ ] 14 [ ] 15 [ ] 16 [ ] 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)
National Association of Insurance and Financial Advisors Political Action Committee

**A.**
Full Name (Last, First, Middle Initial): Mr. Barry N. Koslow, CLU, JD
Mailing Address: 6 Spearfields Lane
City: Lynnfield State: MA Zip Code: 01940
FEC ID number of contributing federal political committee.
Name of Employer: USI Consulting Group – Executive and
Occupation: CFO
Receipt For: Primary General
Other (specify) ▼
Aggregate Year-to-Date ▼ 300.00
Date of Receipt: 01 06 2003
Amount of Each Receipt this Period: 300.00
Check
Transaction ID: R1368053

**B.**
Full Name (Last, First, Middle Initial): Mr. William L. MacDonald
Mailing Address: Vantage Club 74-160 Quail Lakes Drive
City: Indian Wells State: CA Zip Code: 92210
FEC ID number of contributing federal political committee.
Name of Employer: Clark/Bardes Consulting
Occupation: President & CEO
Receipt For: Primary General
Other (specify) ▼
Aggregate Year-to-Date ▼ 250.00
Date of Receipt: 01 16 2003
Amount of Each Receipt this Period: 250.00
Check
Transaction ID: R1368313

**C.**
Full Name (Last, First, Middle Initial): Ms. Dorothee D. Maynard-Rogers
Mailing Address: 15 Messenger Dr.
City: Warwick State: RI Zip Code: 02886-1020
FEC ID number of contributing federal political committee.
Name of Employer: The Good Neighbor Alliance Corp
Occupation: President
Receipt For: Primary General
Other (specify) ▼
Aggregate Year-to-Date ▼ 600.00
Date of Receipt: 01 21 2003
Amount of Each Receipt this Period: 600.00
Check
Transaction ID: R1368339

**SUBTOTAL** of Receipts This Page (optional) ..... ▶ **1150.00**

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

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

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

FOR LINE NUMBER: (check only one) PAGE 12 / 18

[X] 11a [ ] 11b [ ] 11c [ ] 12 [ ] 13 [ ] 14 [ ] 15 [ ] 16 [ ] 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)
National Association of Insurance and Financial Advisors Political Action Committee

**A.**
Full Name (Last, First, Middle Initial): Mr. Patrick C. McBride, LUTCF
Mailing Address: 4109 Helmsdale Circle
City: South Jordan State: UT Zip Code: 84095-9115
FEC ID number of contributing federal political committee.
Name of Employer: Progressive Planning
Occupation: General Agent
Receipt For: Primary General
Other (specify)
Aggregate Year-to-Date: 250.00
Date of Receipt: 01 06 2003
Amount of Each Receipt this Period: 250.00
Check
Transaction ID: R1368046

**B.**
Full Name (Last, First, Middle Initial): Mr. George Winger McCloy, CLU
Mailing Address: 921 Chatham Lane #300
City: Columbus State: OH Zip Code: 43221-2418
FEC ID number of contributing federal political committee.
Name of Employer: McCloy Financial Services
Occupation: General Agent
Receipt For: Primary General
Other (specify)
Aggregate Year-to-Date: 500.00
Date of Receipt: 01 02 2003
Amount of Each Receipt this Period: 500.00
Check
Transaction ID: R1367949

**C.**
Full Name (Last, First, Middle Initial): Mr. Bruce F. McGuirk, CLU, ChFC
Mailing Address: 6002 Armfield Court
City: Summerfield State: NC Zip Code: 27358
FEC ID number of contributing federal political committee.
Name of Employer: Manulife Financial
Occupation: Regional Director
Receipt For: Primary General
Other (specify)
Aggregate Year-to-Date: 550.00
Date of Receipt: 01 21 2003
Amount of Each Receipt this Period: 550.00
Check
Transaction ID: R1368334

**SUBTOTAL** of Receipts This Page (optional) ..... ▶ **1300.00**

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

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

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

FOR LINE NUMBER: (check only one) PAGE 13 / 18

[X] 11a [ ] 11b [ ] 11c [ ] 12 [ ] 13 [ ] 14 [ ] 15 [ ] 16 [ ] 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)
National Association of Insurance and Financial Advisors Political Action Committee

**A.** Full Name (Last, First, Middle Initial)
Mr. Allan T. Mendels, CLU, ChFC

Mailing Address
9 The Birches

City: Roslyn Estates | State: NY | Zip Code: 11576-1701

FEC ID number of contributing federal political committee.

Name of Employer: Mendels & Associates
Occupation: Insurance Agent

Receipt For: Primary General
Other (specify) ▼

Aggregate Year-to-Date ▼ 250.00

Date of Receipt: 01 10 2003

Amount of Each Receipt this Period: 250.00

Check

Transaction ID: R1368176

**B.** Full Name (Last, First, Middle Initial)
Mr. Ralph W. Pellecchia, CLU, ChFC

Mailing Address
1A Brooklyn Blvd. P.O. Box 259

City: Sea Girt | State: NJ | Zip Code: 08750

FEC ID number of contributing federal political committee.

Name of Employer: AXA Advisors, LLC
Occupation: Insurance Agent

Receipt For: Primary General
Other (specify) ▼

Aggregate Year-to-Date ▼ 480.00

Date of Receipt: 01 27 2003

Amount of Each Receipt this Period: 480.00

Check

Transaction ID: R1372294

**C.** Full Name (Last, First, Middle Initial)
Mr. James M. Pollock

Mailing Address
10 Foxtail

City: Portola Valley | State: CA | Zip Code: 94028

FEC ID number of contributing federal political committee.

Name of Employer: Pollock Financial Group
Occupation: President & CEO

Receipt For: Primary General
Other (specify) ▼

Aggregate Year-to-Date ▼ 500.00

Date of Receipt: 01 21 2003

Amount of Each Receipt this Period: 500.00

Check

Transaction ID: R1368353

**SUBTOTAL** of Receipts This Page (optional) ..... ▶ **1230.00**

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

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

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

FOR LINE NUMBER: (check only one) PAGE 14 / 18

[X] 11a [ ] 11b [ ] 11c [ ] 12 [ ] 13 [ ] 14 [ ] 15 [ ] 16 [ ] 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)
National Association of Insurance and Financial Advisors Political Action Committee

**A.**
Full Name (Last, First, Middle Initial): Mr. Reginald N. Rabjohns, CLU, ChFC
Mailing Address: 8700 W. Bryn Mawr Ave., #600 S.
City: Chicago State: IL Zip Code: 60631-3507
FEC ID number of contributing federal political committee.
Name of Employer: New England Financial
Occupation: Managing Partner
Receipt For: Primary General
Other (specify) ▼
Aggregate Year-to-Date ▼ 500.00
Date of Receipt: 01 28 2003
Amount of Each Receipt this Period: 500.00
Credit Card
**Transaction ID:** R1372223

**B.**
Full Name (Last, First, Middle Initial): Mr. Richard A. Renwick
Mailing Address: 484 Sandy Valley Road
City: Westwood State: MA Zip Code: 02090-1130
FEC ID number of contributing federal political committee.
Name of Employer: PRW Associates Inc, a NFP Company
Occupation: Principal
Receipt For: Primary General
Other (specify) ▼
Aggregate Year-to-Date ▼ 300.00
Date of Receipt: 01 02 2003
Amount of Each Receipt this Period: 300.00
Check
**Transaction ID:** R1367932

**C.**
Full Name (Last, First, Middle Initial): Mr. Donald M. Sse, CLU
Mailing Address: 6820 Eagle Mountain Rd
City: Manitou Springs State: CO Zip Code: 80829-2860
FEC ID number of contributing federal political committee.
Name of Employer: Pass It On, Inc.
Occupation: Insurance Agent
Receipt For: Primary General
Other (specify) ▼
Aggregate Year-to-Date ▼ 500.00
Date of Receipt: 01 27 2003
Amount of Each Receipt this Period: 500.00
Check
**Transaction ID:** R1372150

**SUBTOTAL** of Receipts This Page (optional) ..... ▶ **1300.00**

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

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

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

FOR LINE NUMBER: (check only one) PAGE 15 / 18

[X] 11a [ ] 11b [ ] 11c [ ] 12 [ ] 13 [ ] 14 [ ] 15 [ ] 16 [ ] 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)
National Association of Insurance and Financial Advisors Political Action Committee

**A.**
Full Name (Last, First, Middle Initial): Mr. John Bryan Setzler
Mailing Address: 1996 6th St. NW
City: Hickory | State: NC | Zip Code: 28601-1857
FEC ID number of contributing federal political committee.
Name of Employer: Capital Concepts Inc.
Occupation: Insurance Agent
Receipt For: Primary General
Other (specify)
Aggregate Year-to-Date: 550.00
Date of Receipt: 01 06 2003
Amount of Each Receipt this Period: 550.00
Check
Transaction ID: R1368017

**B.**
Full Name (Last, First, Middle Initial): Mr. Jeffrey D. Sharp, CLU, ChFC, CFP
Mailing Address: 9735 Fieldcrest Dr.
City: Omaha | State: NE | Zip Code: 68114
FEC ID number of contributing federal political committee.
Name of Employer: SilverStone Group, Inc.
Occupation: Principal
Receipt For: Primary General
Other (specify)
Aggregate Year-to-Date: 500.00
Date of Receipt: 01 10 2003
Amount of Each Receipt this Period: 500.00
Check
Transaction ID: R1368169

**C.**
Full Name (Last, First, Middle Initial): Mr. David Lee Solis
Mailing Address: 3412 Calabasas Ct
City: Calabasas | State: CA | Zip Code: 91302-3076
FEC ID number of contributing federal political committee.
Name of Employer: DLS Consultants
Occupation: Medical Director
Receipt For: Primary General
Other (specify)
Aggregate Year-to-Date: 250.00
Date of Receipt: 01 17 2003
Amount of Each Receipt this Period: 250.00
Check
Transaction ID: R1368327

**SUBTOTAL** of Receipts This Page (optional) ..... ▶ **1300.00**

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

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

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

FOR LINE NUMBER: (check only one) PAGE 16 / 18

[X] 11a [ ] 11b [ ] 11c [ ] 12 [ ] 13 [ ] 14 [ ] 15 [ ] 16 [ ] 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)
National Association of Insurance and Financial Advisors Political Action Committee

**A.**

Full Name (Last, First, Middle Initial)
Mr. Brent J. Welch, CLU, ChFC, CFP

Mailing Address
2711 S. Cedar Ave.

City: Holmen | State: WI | Zip Code: 54636-9199

FEC ID number of contributing federal political committee.

Name of Employer: Guardian
Occupation: President

Receipt For: Primary General
Other (specify)

Aggregate Year-to-Date: 800.00

Date of Receipt: 01 02 2003

Amount of Each Receipt this Period: 800.00

Check

Transaction ID: R1367943

**B.**

Full Name (Last, First, Middle Initial)
Mr. Andrew D. Westham, CLU

Mailing Address
462 Stevens Ave Ste 302

City: Solana Beach | State: CA | Zip Code: 92075

FEC ID number of contributing federal political committee.

Name of Employer: Wealth Transfer Planning, Inc.
Occupation: Insurance Agent

Receipt For: Primary General
Other (specify)

Aggregate Year-to-Date: 500.00

Date of Receipt: 01 07 2003

Amount of Each Receipt this Period: 500.00

Credit Card

Transaction ID: R1368216

**C.**

**SUBTOTAL** of Receipts This Page (optional) ..... ▶ **1100.00**

**TOTAL** This Period (last page this line number only) ..... ▶ **13320.63**

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



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)
National Association of Insurance and Financial Advisors Political Action Committee

**A.**
Full Name (Last, First, Middle Initial)
Renzi for Congress

Mailing Address
PO Box 219
City: Flagstaff State: AZ Zip Code: 86002

Purpose of Disbursement
Contribution: Richard Renzi (AZ-1-R-debt

Candidate Name
Rick Renzi (AZ-1-R)

Category/Type

Office Sought: X House / Senate / President
State: AZ District: 1

Disbursement For: 2002
Primary / X General / Other (specify)

Date of Disbursement
01 03 2003

Amount of Each Disbursement this Period
5000.00

Contribution: Richard Renzi (AZ-1-R-debt retirement-US House)

Transaction ID: D7071

**B.**
Full Name (Last, First, Middle Initial)
Chris Chocola for Congress, Inc.

Mailing Address
PO Box 6728
City: South Bend State: IN Zip Code: 46660

Purpose of Disbursement
Contribution: Chris Chocola (IN-2-R-debt

Candidate Name
Chris Chocola (IN-2-R)

Category/Type

Office Sought: X House / Senate / President
State: IN District: 2

Disbursement For: 2002
Primary / X General / Other (specify)

Date of Disbursement
01 03 2003

Amount of Each Disbursement this Period
3000.00

Contribution: Chris Chocola (IN-2-R-debt retirement-US House)

Transaction ID: D7072

**C.**

**SUBTOTAL** of Disbursements This Page (optional) ..... ▶ **8000.00**

**TOTAL** This Period (last page this line number only) ..... ▶ **8000.00**

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



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)
National Association of Insurance and Financial Advisors Political Action Committee

**A.**
Full Name (Last, First, Middle Initial): George Dunlap
Mailing Address: 1863 Glen Oaks Drive
City: West Des Moines State: IA Zip Code: 50266
Purpose of Disbursement: Refund to Individual
Candidate Name
Office Sought: House / Senate / President
State: District:
Disbursement For: 2003 Primary General X Other (specify)
Category/Type: Refund to Individual
Date of Disbursement: 01 14 2003
Amount of Each Disbursement this Period: 100.00
Transaction ID: D7073

**B.**
Full Name (Last, First, Middle Initial): Lewis Halsall
Mailing Address: 6045 Atlantic Blvd.
City: Norcross State: CA Zip Code: 30071
Purpose of Disbursement: Refund to Individual
Candidate Name
Office Sought: House / Senate / President
State: District:
Disbursement For: 2003 Primary General X Other (specify)
Category/Type: Refund to Individual
Date of Disbursement: 01 14 2003
Amount of Each Disbursement this Period: 125.00
Transaction ID: D7074

**C.**
Full Name (Last, First, Middle Initial): John Balis
Mailing Address: 3305 Desert Willow Cove
City: Austin State: TX Zip Code: 78735
Purpose of Disbursement: Refund to Individual
Candidate Name
Office Sought: House / Senate / President
State: District:
Disbursement For: 2003 Primary General X Other (specify)
Category/Type: Refund to Individual
Date of Disbursement: 01 23 2003
Amount of Each Disbursement this Period: 1000.00
Transaction ID: D7076

**SUBTOTAL** of Disbursements This Page (optional) ..... ▶ **1225.00**

**TOTAL** This Period (last page this line number only) ..... ▶ **1225.00**