

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**
Check if different than previously reported. (ACC) **Washington DC 20033-0079**

2. FEC IDENTIFICATION NUMBER ▼ CITY ▲ STATE ▲ ZIP CODE ▲
C C00370130 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) General (12G) Runoff (12R)
 Convention (12C) Special (12S)
Election on / / in the State of
(d) 30-Day POST-Election Report for the:
 General (30G) Runoff (30R) Special (30S)
Election on / / in the State of

5. Covering Period / / 2023 through / / 2023

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 **Pare, Frank, , ,**

Signature of Treasurer **Pare, Frank, , ,** Date / / 2024

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: 07 / 01 / 2023 To: 12 / 31 / 2023

Table with 2 columns: COLUMN A This Period, COLUMN B Calendar Year-to-Date. Rows include: 6. (a) Cash on Hand January 1, 2023 (185031.61); (b) Cash on Hand at Beginning of Reporting Period (220335.32); (c) Total Receipts (from Line 19) (17661.00 / 60011.00); (d) Subtotal (add Lines 6(b) and 6(c) for Column A and Lines 6(a) and 6(c) for Column B) (237996.32 / 245042.61); 7. Total Disbursements (from Line 31) (36356.99 / 43403.28); 8. Cash on Hand at Close of Reporting Period (subtract Line 7 from Line 6(d)) (201639.33 / 201639.33); 9. Debts and Obligations Owed TO the Committee (0.00); 10. Debts and Obligations Owed BY the Committee (0.00).

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

For further information, contact the Federal Election Commission at 800-424-9530 or visit www.fec.gov

DETAILED SUMMARY PAGE
of Receipts

Write or Type Committee Name

FINANCIAL PLANNING ASSOCIATION POLITICAL ACTION COMMITTEE

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

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).....	15201.00	56091.00
(ii) Unitemized	2460.00	3920.00
(iii) TOTAL (add Lines 11(a)(i) and (ii)).....▶	17661.00	60011.00
(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)	17661.00	60011.00
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)).....▶	17661.00	60011.00
20. Total Federal Receipts (subtract Line 18(c) from Line 19).....▶	17661.00	60011.00

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	36356.99	43403.28
(c) Total Operating Expenditures (add 21(a)(i), (a)(ii), and (b))	36356.99	43403.28
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)) ..	36356.99	43403.28
32. Total Federal Disbursements (subtract Line 21(a)(ii) and Line 30(a)(ii) from Line 31).....	36356.99	43403.28

DETAILED SUMMARY PAGE
of Disbursements

FEC Form 3X (Rev. 05/2016)

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)	17661.00	60011.00
34. Total Contribution Refunds (from Line 28(d))	0.00	0.00
35. Net Contributions (other than loans) (subtract Line 34 from Line 33)	17661.00	60011.00
36. Total Federal Operating Expenditures (add Line 21(a)(i) and Line 21(b))	36356.99	43403.28
37. Offsets to Operating Expenditures (from Line 15, page 3).....	0.00	0.00
38. Net Operating Expenditures (subtract Line 37 from Line 36)	36356.99	43403.28

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 16
<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. 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 ▼ 3000.00

Date of Receipt 07 / 14 / 2023
Transaction ID : SA11AI.7632
 Amount of Each Receipt this Period 1000.00
 Memo Item

B. Doviak, Margaret, , Dr.,
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name
 Mailing Address 309 E Main St
 City Norman State OK Zip Code 73069
 FEC ID number of contributing federal political committee. **C**
 Name of Employer (for Individual) D.M. Wealth Management Occupation (for Individual) Owner
 Receipt For: Primary General Other (specify) ▼
 Aggregate Year-to-Date ▼ 500.00

Date of Receipt 07 / 18 / 2023
Transaction ID : SA11AI.7634
 Amount of Each Receipt this Period 500.00
 Memo Item

C. Doviak, Margaret, , Dr.,
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name
 Mailing Address 309 E Main St
 City Norman State OK Zip Code 73069
 FEC ID number of contributing federal political committee. **C**
 Name of Employer (for Individual) D.M. Wealth Management Occupation (for Individual) Owner
 Receipt For: Primary General Other (specify)
 Aggregate Year-to-Date ▼ 1500.00

Date of Receipt 09 / 27 / 2023
Transaction ID : SA11AI.7666
 Amount of Each Receipt this Period 1000.00
 Memo Item

SUBTOTAL of Receipts This Page (optional).....	2500.00
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: (check only one)	PAGE 7 OF 16
	<input checked="" type="checkbox"/> 11a	<input type="checkbox"/> 11b
	<input type="checkbox"/> 13	<input type="checkbox"/> 14
	<input type="checkbox"/> 11c	<input type="checkbox"/> 12
	<input type="checkbox"/> 15	<input type="checkbox"/> 16
	<input type="checkbox"/> 17	

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

A. Goren, Matt, J., Dr.,
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name
 Mailing Address 1656 W. Augusta Blvd.
 3W
 City Chicago State IL Zip Code 60622
 FEC ID number of contributing federal political committee. **C**
 Name of Employer (for Individual) American College of Fin Svcs Occupation (for Individual) Professor, Financial Planning
 Receipt For: Primary General Other (specify) ▼
 Aggregate Year-to-Date ▼ 250.00

Date of Receipt 09 / 28 / 2023
Transaction ID : SA11Al.7677
 Amount of Each Receipt this Period 250.00
 Memo Item

B. Haas, David, J., ,
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name
 Mailing Address 795 Franklin Ave.
 City Franklin Lakes State NJ Zip Code 07417
 FEC ID number of contributing federal political committee. **C**
 Name of Employer (for Individual) Cereus Financial Advisors, LLC Occupation (for Individual) Principal
 Receipt For: Primary General Other (specify) ▼
 Aggregate Year-to-Date ▼ 250.00

Date of Receipt 09 / 27 / 2023
Transaction ID : SA11Al.7673
 Amount of Each Receipt this Period 250.00
 Memo Item

C. Kane, Claudia, C., ,
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name
 Mailing Address 793 Reddick Way
 City El Dorado Hills State CA Zip Code 95762
 FEC ID number of contributing federal political committee. **C**
 Name of Employer (for Individual) Financial Planning Association Occupation (for Individual) Director of Advocacy
 Receipt For: Primary General Other (specify)
 Aggregate Year-to-Date ▼ 5000.00

Date of Receipt 09 / 28 / 2023
Transaction ID : SA11Al.7676
 Amount of Each Receipt this Period 5000.00
 Memo Item

SUBTOTAL of Receipts This Page (optional).....	5500.00
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: (check only one)	PAGE 8 OF 16
	<input checked="" type="checkbox"/> 11a <input type="checkbox"/> 13	<input type="checkbox"/> 11b <input type="checkbox"/> 14

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

Full Name of Individual (Last, First, Middle Initial) or Full Organization Name A. Keller, Kevin, R, ,			Date of Receipt M M M / D D D / Y Y Y Y Y Y 09 / 22 / 2023		
Mailing Address 1425 K Street NW Suite 800			Transaction ID : SA11AI.7669		
City Washington	State DC	Zip Code 20005	Amount of Each Receipt this Period 200.00		
FEC ID number of contributing federal political committee. C			<input type="checkbox"/> Memo Item		
Name of Employer (for Individual) CFP Board of Standards		Occupation (for Individual) CEO			
Receipt For: <input type="checkbox"/> Primary <input type="checkbox"/> General <input type="checkbox"/> Other (specify) ▼		Aggregate Year-to-Date ▼ 450.00			

Full Name of Individual (Last, First, Middle Initial) or Full Organization Name B. Kenealy, Kathleen, , ,			Date of Receipt M M M / D D D / Y Y Y Y Y Y 09 / 27 / 2023		
Mailing Address 9 Hope Lane			Transaction ID : SA11AI.7667		
City Woburn	State MA	Zip Code 01801	Amount of Each Receipt this Period 500.00		
FEC ID number of contributing federal political committee. C			<input type="checkbox"/> Memo Item		
Name of Employer (for Individual) Katapult Financial Planning		Occupation (for Individual) Principal			
Receipt For: <input type="checkbox"/> Primary <input type="checkbox"/> General <input type="checkbox"/> Other (specify) ▼		Aggregate Year-to-Date ▼ 500.00			

Full Name of Individual (Last, First, Middle Initial) or Full Organization Name C. Kirchenbauer, Lisa, AK, ,			Date of Receipt M M M / D D D / Y Y Y Y Y Y 09 / 27 / 2023		
Mailing Address 200 N. Glebe Rd.			Transaction ID : SA11AI.7680		
City Arlington	State VA	Zip Code 22203	Amount of Each Receipt this Period 500.00		
FEC ID number of contributing federal political committee. C			<input type="checkbox"/> Memo Item		
Name of Employer (for Individual) Omega Wealth Management		Occupation (for Individual) President			
Receipt For: <input type="checkbox"/> Primary <input type="checkbox"/> General <input type="checkbox"/> Other (specify)		Aggregate Year-to-Date ▼ 1000.00			

SUBTOTAL of Receipts This Page (optional).....	1200.00
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: (check only one)	PAGE 9 OF 16
	<input checked="" type="checkbox"/> 11a	<input type="checkbox"/> 11b
	<input type="checkbox"/> 13	<input type="checkbox"/> 14
	<input type="checkbox"/> 11c	<input type="checkbox"/> 12
	<input type="checkbox"/> 15	<input type="checkbox"/> 16
	<input type="checkbox"/> 17	

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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 ▼ 5000.00

Date of Receipt 09 / 28 / 2023
Transaction ID : SA11AI.7650
 Amount of Each Receipt this Period 2000.00
 Memo Item

B. Locke, Wayne, L., ,
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name
 Mailing Address 39 Fox Ridge Drive
 City New Milford State CT Zip Code 06776
 FEC ID number of contributing federal political committee. **C**
 Name of Employer (for Individual) Matson Financial Advisors Inc. Occupation (for Individual) Financial Planner
 Receipt For: Primary General Other (specify) ▼
 Aggregate Year-to-Date ▼ 250.00

Date of Receipt 09 / 27 / 2023
Transaction ID : SA11AI.7665
 Amount of Each Receipt this Period 250.00
 Memo Item

C. Loftin, James, D., ,
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name
 Mailing Address 6470 E. Johns Xing
 Suite 230
 City Duluth State GA Zip Code 30097
 FEC ID number of contributing federal political committee. **C**
 Name of Employer (for Individual) GER Loftin Wealth Advisors LLC Occupation (for Individual) CEO
 Receipt For: Primary General Other (specify)
 Aggregate Year-to-Date ▼ 1200.00

Date of Receipt 09 / 30 / 2023
Transaction ID : SA11AI.7686
 Amount of Each Receipt this Period 1200.00
 Memo Item

SUBTOTAL of Receipts This Page (optional).....	3450.00
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: (check only one)	PAGE 10 OF 16
	<input checked="" type="checkbox"/> 11a <input type="checkbox"/> 13	<input type="checkbox"/> 11b <input type="checkbox"/> 14

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

A. Pike, Michelle, G., ,
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name
 Mailing Address 2101 Highland Ave 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 Wealth Advisors Occupation (for Individual) Financial Planner
 Receipt For: Primary General Other (specify) Aggregate Year-to-Date 500.00

Date of Receipt 09 / 28 / 2023
Transaction ID : SA11AI.7663
 Amount of Each Receipt this Period 500.00
 Memo Item

B. Rugg, Jamie, , ,
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name
 Mailing Address 1224 Ocean Park Blvd Apt C
 City Santa Monica State CA Zip Code 90405
 FEC ID number of contributing federal political committee. C
 Name of Employer (for Individual) Highline Wealth Partners Occupation (for Individual) VP, Wealth Management
 Receipt For: Primary General Other (specify) Aggregate Year-to-Date 250.00

Date of Receipt 09 / 28 / 2023
Transaction ID : SA11AI.7681
 Amount of Each Receipt this Period 250.00
 Memo Item

C. 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 1001.00

Date of Receipt 09 / 28 / 2023
Transaction ID : SA11AI.7672
 Amount of Each Receipt this Period 501.00
 Memo Item

SUBTOTAL of Receipts This Page (optional)..... 1251.00
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: (check only one)	PAGE 11 OF 16
<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

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

A. Stueve, Cherie, , ,
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name
 Mailing Address 451 Sheffield Rd
 City Alameda State CA Zip Code 94502
 FEC ID number of contributing federal political committee. **C**
 Name of Employer (for Individual) Self Employed Occupation (for Individual) Financial Wellness Advisor
 Receipt For: 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
 12 / 18 / 2023
Transaction ID : SA11AI.7722
 Amount of Each Receipt this Period
 500.00
 Memo Item

B. Tanimoto, Jared, , ,
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name
 Mailing Address 26 Teak Bridge
 City Irvine State CA Zip Code 92620
 FEC ID number of contributing federal political committee. **C**
 Name of Employer (for Individual) Ascent Wealth Advisors Occupation (for Individual) Founder
 Receipt For: 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
 09 / 30 / 2023
Transaction ID : SA11AI.7679
 Amount of Each Receipt this Period
 300.00
 Memo Item

C. Zimmerman, Steven, D, ,
 Full Name of Individual (Last, First, Middle Initial) or Full Organization Name
 Mailing Address 14530 Pennock Ave
 City Apple Valley State MN Zip Code 55124
 FEC ID number of contributing federal political committee. **C**
 Name of Employer (for Individual) Mindful Asset Planning Occupation (for Individual) Co-Founder, Sr Financial Strategist
 Receipt For: 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
 12 / 31 / 2023
Transaction ID : SA11AI.7724
 Amount of Each Receipt this Period
 500.00
 Memo Item

SUBTOTAL of Receipts This Page (optional).....	1300.00
TOTAL This Period (last page this line number only).....	15201.00

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

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NAME OF COMMITTEE (In Full)

FINANCIAL PLANNING ASSOCIATION POLITICAL ACTION COMMITTEE

Full Name (Last, First, Middle Initial)

A. Financial Planning Association

Mailing Address 1290 Broadway
Suite 1625

City Denver State CO Zip Code 80203

Purpose of Disbursement
Reimbursement-PAC Retreat Expenses

Candidate Name

Office Sought: House
 Senate
 President
State: District:

Disbursement For:
 Primary General
 Other (specify) ▼

Category/
Type

Date of Disbursement

M	M	/	D	D	/	Y	Y	Y	Y
10			20			2023			

FEC Identification Number

C
Transaction ID : SB21B.7693

Amount of Each Disbursement this Period

15581.99

Memo Item

Full Name (Last, First, Middle Initial)

B. McAllister & Quinn

Mailing Address 1625 Eye Street NW
Suite 750

City Washington State DC Zip Code 20006

Purpose of Disbursement
PAC Retreat - Travel

Candidate Name

Office Sought: House
 Senate
 President
State: District:

Disbursement For:
 Primary General
 Other (specify) ▼

Category/
Type

Date of Disbursement

M	M	/	D	D	/	Y	Y	Y	Y
07			01			2023			

FEC Identification Number

C
Transaction ID : SB21B.7693.c

Amount of Each Disbursement this Period

288.60

Memo Item

Full Name (Last, First, Middle Initial)

C. Hyatt Regency Coconut Point Resort & Spa

Mailing Address 5001 Coconut Road

City Bonita Springs State FL Zip Code 34134

Purpose of Disbursement
Lodging

Candidate Name

Office Sought: House
 Senate
 President
State: District:

Disbursement For:
 Primary General
 Other (specify) ▼

Category/
Type

Date of Disbursement

M	M	/	D	D	/	Y	Y	Y	Y
05			03			2023			

FEC Identification Number

C
Transaction ID : SB21B.7693.

Amount of Each Disbursement this Period

288.79

Memo Item

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

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

15581.99

**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

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NAME OF COMMITTEE (In Full)

FINANCIAL PLANNING ASSOCIATION POLITICAL ACTION COMMITTEE

Full Name (Last, First, Middle Initial)

A. Hyatt Regency Coconut Point Resort & Spa

Date of Disbursement

M	M	/	D	D	/	Y	Y	Y	Y
0	5		1	8		2	0	2	3

Mailing Address 5001 Coconut Road

City Bonita Springs State FL Zip Code 34134

FEC Identification Number

C

Transaction ID : SB21B.7693.:

Amount of Each Disbursement this Period

3378.05

Purpose of Disbursement PAC Reception - Food & Beverage

Category/Type

Candidate Name

Office Sought: House Senate President

Disbursement For: Primary General Other (specify) ▼

State: District:

Memo Item

Full Name (Last, First, Middle Initial)

B. Phoenix Park Hotel, LLC

Date of Disbursement

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

Mailing Address 520 North Capitol Street, NW

City Washington State DC Zip Code 20001

FEC Identification Number

C

Transaction ID : SB21B.7693.4

Amount of Each Disbursement this Period

4896.25

Purpose of Disbursement PAC Retreat - Food & Beverage

Category/Type

Candidate Name

Office Sought: House Senate President

Disbursement For: Primary General Other (specify) ▼

State: District:

Memo Item

Full Name (Last, First, Middle Initial)

C. Phoenix Park Hotel, LLC

Date of Disbursement

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

Mailing Address 520 North Capitol Street, NW

City Washington State DC Zip Code 20001

FEC Identification Number

C

Transaction ID : SB21B.7693.

Amount of Each Disbursement this Period

6531.25

Purpose of Disbursement PAC Retreat - Food & Beverage

Category/Type

Candidate Name

Office Sought: House Senate President

Disbursement For: Primary General Other (specify) ▼

State: District:

Memo Item

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

0.00

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)

21b 22 23 26 27
 28a 28b 28c 29 30b

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NAME OF COMMITTEE (In Full)

FINANCIAL PLANNING ASSOCIATION POLITICAL ACTION COMMITTEE

Full Name (Last, First, Middle Initial)

A. Financial Planning Association

Date of Disbursement

/ /
 10 / 27 / 2023

Mailing Address 1290 Broadway
Suite 1625

City Denver State CO Zip Code 80203

Purpose of Disbursement
Reimbursement - Support Services

FEC Identification Number

Transaction ID : SB21B.7696
Amount of Each Disbursement this Period

Candidate Name

Category/Type

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

Memo Item

Full Name (Last, First, Middle Initial)

B. Loney, Lauren, A., ,

Date of Disbursement

/ /
 09 / 30 / 2023

Mailing Address 1290 Broadway
Suite 1625

City Denver State CO Zip Code 80203

Purpose of Disbursement
Administrative & Managerial Support

FEC Identification Number

Transaction ID : SB21B.7696.0
Amount of Each Disbursement this Period

Candidate Name

Category/Type

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

Memo Item

Full Name (Last, First, Middle Initial)

C. Katz Compliance, LLC

Date of Disbursement

/ /
 07 / 07 / 2023

Mailing Address PO Box 33079

City Washington State DC Zip Code 20033-0079

Purpose of Disbursement
Compliance Services

FEC Identification Number

Transaction ID : SB21B.7640
Amount of Each Disbursement this Period

Candidate Name

Category/Type

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

Memo Item

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

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

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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	8		0	9		2	0	2	3

FEC Identification Number

C

Transaction ID : SB21B.7648

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

Disbursement For:

 Primary General
 Other (specify) ▼

State:

District:

Date of Disbursement

M	M	/	D	D	/	Y	Y	Y	Y
0	9		0	7		2	0	2	3

FEC Identification Number

C

Transaction ID : SB21B.7687

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
1	0		0	6		2	0	2	3

FEC Identification Number

C

Transaction ID : SB21B.7695

Amount of Each Disbursement this Period

650.00

Memo Item

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

1950.00

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

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

A. Katz Compliance, LLC

Full Name (Last, First, Middle Initial)

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: 11 / 29 / 2023

FEC Identification Number: C
Transaction ID : SB21B.7726

Amount of Each Disbursement this Period: 650.00

Memo Item

B. Mattick & Associates, LLC

Full Name (Last, First, Middle Initial)

Mailing Address 502 W. Fellars Dr.

City Phoenix State AZ Zip Code 85023

Purpose of Disbursement
Fundraising Services

Candidate Name

Office Sought: House Senate President
Disbursement For: Primary General Other (specify) ▼

State: District:

Date of Disbursement: 09 / 15 / 2023

FEC Identification Number: C
Transaction ID : SB21B.7690

Amount of Each Disbursement this Period: 600.00

Memo Item

C. Mattick & Associates, LLC

Full Name (Last, First, Middle Initial)

Mailing Address 502 W. Fellars Dr.

City Phoenix State AZ Zip Code 85023

Purpose of Disbursement
Fundraising Services

Candidate Name

Office Sought: House Senate President
Disbursement For: Primary General Other (specify) ▼

State: District:

Date of Disbursement: 09 / 29 / 2023

FEC Identification Number: C
Transaction ID : SB21B.7691

Amount of Each Disbursement this Period: 600.00

Memo Item

SUBTOTAL of Disbursements This Page (optional).....▶	1850.00
TOTAL This Period (last page this line number only).....▶	36281.99