

# FEC FORM 1

# STATEMENT OF ORGANIZATION

Office Use Only

1. NAME OF COMMITTEE (in full)  (Check if name is changed) Example: If typing, type over the lines. 12FE4M5

CUNA Mutual Holding Company Political Action Committee/TruStage PAC

ADDRESS (number and street) 5910 Mineral Point Rd, PO Box 747

(Check if address is changed) Mail Stop 5910 4 A2

Madison WI 53701-0747  
CITY ▲ STATE ▲ ZIP CODE ▲

### COMMITTEE'S E-MAIL ADDRESS

(Check if address is changed) christopher.roe@trustage.com

Optional Second E-Mail Address

### COMMITTEE'S WEB PAGE ADDRESS (URL)

(Check if address is changed) https://www.trustage.com

2. DATE 06 / 20 / 2023

3. FEC IDENTIFICATION NUMBER C C00402107

4. IS THIS STATEMENT  NEW (N) OR  AMENDED (A)

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

Type or Print Name of Treasurer Roe, Christopher, P.,

Signature of Treasurer Roe, Christopher, P., Date 10 / 26 / 2023

NOTE: Submission of false, erroneous, or incomplete information may subject the person signing this Statement to the penalties of 52 U.S.C. §30109. ANY CHANGE IN INFORMATION SHOULD BE REPORTED WITHIN 10 DAYS.

5. TYPE OF COMMITTEE:

**Candidate Committee:**

- (a)  This committee is a principal campaign committee. (Complete the candidate information below.)
- (b)  This committee is an authorized committee, and is NOT a principal campaign committee. (Complete the candidate information below.)

Name of Candidate

Candidate Party Affiliation  Office Sought:  House  Senate  President State  District

- (c)  This committee supports/opposes only one candidate, and is NOT an authorized committee.

Name of Candidate

**Party Committee:**

- (d)  This committee is a  (National, State or subordinate) committee of the  (Democratic, Republican, etc.) Party

**Political Action Committee (PAC):**

- (e)  This committee is a separate segregated fund. (Identify connected organization on line 6.) Its connected organization is a:

Corporation  Corporation w/o Capital Stock  Labor Organization  
 Membership Organization  Trade Association  Cooperative

In addition, this committee is a Lobbyist/Registrant PAC.

- (f)  This committee supports/opposes more than one Federal candidate, and is NOT a separate segregated fund or party committee. (i.e., nonconnected committee)

In addition, this committee is a Lobbyist/Registrant PAC.

In addition, this committee is a Leadership PAC. (Identify sponsor on line 6.)

- (g)  This committee is an independent expenditure-only political committee (Super PAC).

In addition, this committee is a Lobbyist/Registrant PAC.

- (h)  This committee is a political committee with both contribution and non-contribution accounts (Hybrid PAC).

In addition, this committee is a Lobbyist/Registrant PAC.

**Joint Fundraising Representative:**

- (i)  This committee collects contributions, pays fundraising expenses and disburses net proceeds for two or more political committees/organizations, at least one of which is an authorized committee of a federal candidate.
- (j)  This committee collects contributions, pays fundraising expenses and disburses net proceeds for two or more political committees/organizations, none of which is an authorized committee of a federal candidate.

Committees Participating in Joint Fundraiser

1.

2.

C

C

Write or Type Committee Name

CUNA Mutual Holding Company Political Action Committee/TruStage PAC

6. Name of Any Connected Organization, Affiliated Committee, Joint Fundraising Representative, or Leadership PAC Sponsor

CUNA Mutual Holding Company

Mailing Address 5910 Mineral Point Road

Madison WI 53705

CITY ▲

STATE ▲

ZIP CODE ▲

Relationship: [X] Connected Organization [ ] Affiliated Organization [ ] Joint Fundraising Representative [ ] Leadership PAC Sponsor

7. Custodian of Records: Identify by name, address (phone number -- optional) and position of the person in possession of committee books and records.

Full Name Roe, Christopher, P., ,

Mailing Address 2 Hawk Feather Cir

Madison WI 53717

CITY ▲

STATE ▲

ZIP CODE ▲

Title or Position ▼

SVP

Telephone number

8. Treasurer: List the name and address (phone number -- optional) of the treasurer of the committee; and the name and address of any designated agent (e.g., assistant treasurer).

Full Name of Treasurer Roe, Christopher, P., ,

Mailing Address 2 Hawk Feather Cir

Madison WI 53717

CITY ▲

STATE ▲

ZIP CODE ▲

Title or Position ▼

SVP

Telephone number

Full Name of Designated Agent

Denholm, James, , ,

Mailing Address

2318 Minnetonka Drive

Cedar Falls

IA

50613

CITY ▲

STATE ▲

ZIP CODE ▲

Title or Position ▼

Assistant Treasurer

Telephone number

319

483

2314

9. Banks or Other Depositories: List all banks or other depositories in which the committee deposits funds, holds accounts, rents safety deposit boxes or maintains funds.

Name of Bank, Depository, etc.

Summit Credit Union

Mailing Address

401 South Yellowstone Drive

Madison

WI

53719

CITY ▲

STATE ▲

ZIP CODE ▲

Name of Bank, Depository, etc.

Mailing Address

CITY ▲

STATE ▲

ZIP CODE ▲

: 97 `A-G79 @C B9CI G`H9LH`F9 @ H98 `HC`5 `F9DCFH`G7 <98I @ `CF`-H9A-N5H-CB

Form/Schedule: F1A  
Transaction ID :

Made the following updates to the Form 1: 1) Changed the Assistant Treasurer from Thomas Martorana to James Denholm; 2) Updated the Treasurer's e-mail address from christopher.roe@cunamutual.com to christopher.roe@trustage.com; 3) Updated the website address from www.cunamutual.com to www.trustage.com; and 4) Updated the PAC name from CUNA Mutual Holding Company Political Action Committee (CUNA Mutual PAC) to CUNA Mutual Holding Company Political Action Committee/TruStage PAC. We changed our PAC name due to a brand name change of our company. This name change is supported by Advisory Opinion 2002-04. The connected organization remains as CUNA Mutual Holding Company.

Form/Schedule:  
Transaction ID: