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LOBBYING REPORT

Lobbying Disclosure Act of 1995 (Section 5) - **All Filers Are Required to Complete This Page**

1. Registrant name

Organization: Association for Advanced Life Underwriting

2. Address ☐ Check if different than previously reported

2901 Telestar Court

City: Falls Church State: VA Zip Code: 22042 Country: U

3. Principal place of business (if different than line 2)

City State Zip Code Country

City State/Zip or Country

4a. Contact Name (Prefix, Full Name)	b. Telephone number	c. E-mail	5. Senate ID #
Mr. Marc Cadin	703-641-9400	cadin@aalu.org	

7. Client Name ☒ Self

Association for Advanced Life Underwriting

6. House ID # 37183(

TYPE OF REPORT 8. Year 2004 Midyear (January 1-June30) ☐ OR Year End (July 1-Decem

9. Check if this filing amends a previously filed version of this report ☐

10. Check if this is a Termination Report ☐ ⇨ Termination Date _____ 11. No Lobbying A

INCOME OR EXPENSES - Complete Either Line 12 OR Line 13

12. Lobbying Firms

INCOME relating to lobbying activities for this reporting period was:

Less than $10,000 ☐

$10,000 or more ☐ ⇨ $ _____

Provide a good faith estimate, rounded to the nearest $20,000, of all lobbying related income from the client (including all payments to the registrant by any other entity for lobbying activities on behalf of the client).

13. Organizations

EXPENSES relating to lobbying activities for this repor were:

Less than $10,000 ☐

$10,000 or more ☒ ⇨ $ 612,000

14. REPORTING METHOD. Check box to indicate c accounting method. See instructions for description of c

☐ **Method A.** Reporting amounts using LDA definitio
☐ **Method B.** Reporting amounts under section 6033(b Internal Revenue Code
☒ **Method C.** Reporting amounts under section 162(e) Revenue Code

Form

Printed Name and Title: Marc Cadin, Associate Director of Government Affairs

Go

Registrant Name Association for Advanced Life Underwritin Client Name Association for Advanced Life Und

LOBBYING ACTIVITY. Select as many codes as necessary to reflect the general issue areas in which th engaged in lobbying on behalf of the client during the reporting period. **Using a separate page for each co** information as requested. Attach additional page(s) as needed.

15. General issue area code TAX - Taxation/Internal Revenue Code (one per page)

16. Specific lobbying issues *Add page to continue specific issues description for this issue*

Taxation of split dollar life insurance, corporate-owned life insurance, nonqualified deferred compensation, issues related to estate tax reform and other issues relating to insurance and retirement savings.

17. House(s) of Congress and Federal agencies contacted ☐ Check if None

House of Representatives
Senate
Treasury Department

18. Name of each individual who acted as a lobbyist in this issue area *Add a page to continue adding lobbyists fo*

Name			Covered Official Position (if applicable)
First Name	Last Name	Suffix	
David	Stertzer		
Tom	Korb		
Marc	Cadin		

19. Interest of each foreign entity in the specific issues listed on line 16 above ☒ Check if None

Add a page for a dif

Printed Name and Title Marc Cadin, Associate Director of Government Affairs

Registrant Name Association for Advanced Life Underwriting Client Name Association for Advanced Life Unc

Information Update Page - Complete ONLY where registration information has changed.

20. Client new address

Address

City State Zip Code Country

21. Client new principal place of business (if different than line 20)

City State Zip Code Country

22. New general description of client's business or activities

LOBBYIST UPDATE

23. Name of each previously reported individual who is **no longer** expected to act as a lobbyist for the clien

First Name Last Name Suffix First Name Last Name

1

2

3

4

ISSUE UPDATE

Find the code to select below.

24. General lobbying issues that **no longer** pertain

AFFILIATED ORGANIZATIONS

25. Add the following affiliated organization(s)

Name	Address	Principal place of Bus (city and state or cou
	Address C/S/Z Address C/S/Z	City State Country City State

26. Name of each previously reported organization that is **no longer** affiliated with the registrant or client

1 2 3

FOREIGN ENTITIES

27. Add the following foreign entities

Name	Address Street Address City State/Province Country	Principal place of business (city and state or country)	Amount of contribution for lobbying activities
		City State Country	

28. Name of each previously reported foreign entity that no longer owns, or controls, or is affiliated with the registr affiliated organization

1 3 5

2 4 6

Add a page for m

Printed Name and Title Marc Cadin, Associate Director of Government Affairs