

LOBBYING REPORT

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

1. Registrant Name:

AMERICAN INST OF CERTIFIED PUBLIC ACCOUNTANTS

2. Address:

1455 Pennsylvania Avenue, NW 10th Floor, Washington, DC 20004

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

City: Durham State/Zip(or Country): NC 27707-8110

4. Contact Name: MARK PETERSON

Telephone: 2024349206

E-mail (optional): mpeterson@aicpa.org

Senate ID #: 2640-12

House ID #: 30772000

7. Client Name: ☒ Self

TYPE OF REPORT

8. Year 2007 Midyear (January 1 - June 30): ☐ **OR** Year End (July 1 - December 31): ☒

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 Activity: ☐

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: ☐ => Income (nearest \$20,000): _____

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 reporting period were:

Less than \$10,000: ☐

\$10,000 or more: ☒ => Expenses (nearest \$20,000): 2,403,156.00

14. Reporting Method.

Check box to indicate expense accounting method. See instructions for description of options.

- ☒ **Method A.** Reporting amounts using LDA definitions only
☐ **Method B.** Reporting amounts under section 6033(b)(8) of the Internal Revenue Code
☐ **Method C.** Reporting amounts under section 162(e) of the Internal Revenue Code

Registrant Name: AMERICAN INST OF CERTIFIED PUBLIC ACCOUNTANTS Client Name: Self

LOBBYING ACTIVITY

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

15. General issue area code: ACC (one per page)

16. Specific lobbying issues:

HR 1049 (Sarbanes Oxley Act), HR 1508 (Sarbanes Oxley Act), HR 1550 (Sarbanes Oxley Act), HR 1780 (Sarbanes Oxley Act), HR 1869 (Sarbanes Oxley Act), HR 2727 (Sarbanes Oxley Act), S 869 (Sarbanes Oxley Act), S 1405 (Sarbanes Oxley Act), HR 2829 (SEC Funding Bill)

17. House(s) of Congress and Federal agencies contacted:

HOUSE OF REPRESENTATIVES

SENATE

18. Name of each individual who acted as a lobbyist in this issue area:

Name: BURNS, ROBERT

Covered Official Position (if applicable): N/A

Name: COBB, JANE

Covered Official Position (if applicable): DIRECTOR OF LEGISLATIVE AFFAIRS, SEC

Name: FORNELLI, CYNTHIA

Covered Official Position (if applicable): N/A

Name: O'MALLEY, JAMES A.

Covered Official Position (if applicable): N/A

Name: PETERSON, MARK

Covered Official Position (if applicable): N/A

Name: YOUNG, MATTHEW

Covered Official Position (if applicable): N/A

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

Registrant Name: AMERICAN INST OF CERTIFIED PUBLIC ACCOUNTANTS Client Name: Self

LOBBYING ACTIVITY.

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

15. General issue area code: AGR (one per page)

16. Specific lobbying issues:

HR 2419 (Farm Credit System Loans), S 2302 (Farm Credit System Loans)

17. House(s) of Congress and Federal agencies contacted:

HOUSE OF REPRESENTATIVES

SENATE

18. Name of each individual who acted as a lobbyist in this issue area:

Name: DINACKUS, LISA

Covered Official Position (if applicable): N/A

Name: KRAVITZ, PETER M.

Covered Official Position (if applicable): N/A

Name: PETERSON, MARK

Covered Official Position (if applicable): N/A

Name: YOUNG, MATTHEW

Covered Official Position (if applicable): N/A

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

Registrant Name: AMERICAN INST OF CERTIFIED PUBLIC ACCOUNTANTS Client Name: Self

LOBBYING ACTIVITY.

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

15. General issue area code: BAN (one per page)

16. Specific lobbying issues:

HR 1752 (Financial Statements Audits for FHA Lenders/Mortgage Brokers), HR 1852 (Financial Statements Audits for FHA Lenders/Mortgage Brokers), S 2338 (FHA Modernization Act)

17. House(s) of Congress and Federal agencies contacted:

HOUSE OF REPRESENTATIVES

SENATE

18. Name of each individual who acted as a lobbyist in this issue area:

Name: DINACKUS, LISA

Covered Official Position (if applicable): N/A

Name: KRAVITZ, PETER M.

Covered Official Position (if applicable): N/A

Name: PETERSON, MARK

Covered Official Position (if applicable): N/A

Name: YOUNG, MATTHEW

Covered Official Position (if applicable): N/A

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

Registrant Name: AMERICAN INST OF CERTIFIED PUBLIC ACCOUNTANTS Client Name: Self

LOBBYING ACTIVITY

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

15. General issue area code: CPT (one per page)

16. Specific lobbying issues:

HR 1908 (Patent Reform), HR 2136 (Tax Patents), HR 2365 (Tax Patents), S 681 (Tax Patents), S 1145 (Patent Reform), S 2369 (Tax Patents)

17. House(s) of Congress and Federal agencies contacted:

HOUSE OF REPRESENTATIVES

SENATE

18. Name of each individual who acted as a lobbyist in this issue area:

Name: DINACKUS, LISA

Covered Official Position (if applicable): N/A

Name: KARL, EDWARD

Covered Official Position (if applicable): N/A

Name: KRAVITZ, PETER M.

Covered Official Position (if applicable): N/A

Name: OCHSENSCHLAGER, TOM

Covered Official Position (if applicable): N/A

Name: PETERSON, MARK

Covered Official Position (if applicable): N/A

Name: SHERR, EILEEN

Covered Official Position (if applicable): N/A

Name: YOUNG, MATTHEW

Covered Official Position (if applicable): N/A

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

LOBBYING ACTIVITY.

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

15. General issue area code: EDU (one per page)

16. Specific lobbying issues:

HR 1429 (Audit Partner Rotation), HR 1630 (Rotation), S 556 (Audit Partner Rotation)

17. House(s) of Congress and Federal agencies contacted:

HOUSE OF REPRESENTATIVES

SENATE

18. Name of each individual who acted as a lobbyist in this issue area:

Name: DINACKUS, LISA

Covered Official Position (if applicable): N/A

Name: KRAVITZ, PETER M.

Covered Official Position (if applicable): N/A

Name: PETERSON, MARK

Covered Official Position (if applicable): N/A

Name: YOUNG, MATTHEW

Covered Official Position (if applicable): N/A

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

LOBBYING ACTIVITY.

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

15. General issue area code: SMB (one per page)

16. Specific lobbying issues:

HR 46 (Small Business Tax Flexibility), S 270 (Small Business Tax Flexibility)

17. House(s) of Congress and Federal agencies contacted:

HOUSE OF REPRESENTATIVES

SENATE

18. Name of each individual who acted as a lobbyist in this issue area:

Name: DINACKUS, LISA

Covered Official Position (if applicable): N/A

Name: KARL, EDWARD

Covered Official Position (if applicable): N/A

Name: KRAVITZ, PETER M.

Covered Official Position (if applicable): N/A

Name: PETERSON, MARK

Covered Official Position (if applicable): N/A

Name: YOUNG, MATTHEW

Covered Official Position (if applicable): N/A

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

LOBBYING ACTIVITY

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

15. General issue area code: TAX (one per page)

16. Specific lobbying issues:

HR 1360 (Non-resident Telecommuter Taxation), HR 1591 (Non-resident Alien Provision), HR 2206 (Tax Preparer Standards, Non-resident Alien Provision), HR 2345 (Economic Substance), S 785 (Non-resident Telecommuter Taxation), S 832 (Regulation of Preparers), S 1321 (Confidentiality and Penalty Provisions), HR 3359 (Mobile Workforce State Income Tax and Simplification Act), HR 4318 (Restore Tax Preparer Standard at "Substantial Authority"), S 2242 (Economic Substance)

17. House(s) of Congress and Federal agencies contacted:
HOUSE OF REPRESENTATIVES
SENATE

18. Name of each individual who acted as a lobbyist in this issue area:

Name: DINACKUS, LISA
Covered Official Position (if applicable): N/A
Name: GOLDSTEIN, BENSON
Covered Official Position (if applicable): N/A
Name: HYMAN, MARC
Covered Official Position (if applicable): N/A
Name: KARL, EDWARD
Covered Official Position (if applicable): N/A
Name: KRAVITZ, PETER M.
Covered Official Position (if applicable): N/A
Name: MENKING, BONNER
Covered Official Position (if applicable): N/A
Name: O'MALLEY, JAMES A.
Covered Official Position (if applicable): N/A
Name: OCHSENSCHLAGER, TOM
Covered Official Position (if applicable): N/A
Name: PETERSON, MARK
Covered Official Position (if applicable): N/A
Name: SHERR, EILEEN
Covered Official Position (if applicable): N/A
Name: STROMSEN, WILLIAM
Covered Official Position (if applicable): N/A
Name: TROMPETER, JEAN
Covered Official Position (if applicable): N/A
Name: WHITE, GEORGE
Covered Official Position (if applicable): N/A
Name: WINTON, LISA
Covered Official Position (if applicable): N/A
Name: YOUNG, MATTHEW
Covered Official Position (if applicable): N/A

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

Signature: ON FILE Date: Feb 14, 2008

Printed Name and Title: MARK PETERSON, VICE PRESIDENT -

Information Update Page:

Complete ONLY where registration information has changed.

LOBBYIST UPDATE

23. Name of each previously reported individual who is NO LONGER expected to act as a lobbyist for the client

Name: CLARK, JAMES

ISSUE UPDATE

24. General lobbying issues previously reported that NO LONGER pertain

AFFILIATED ORGANIZATIONS

25. Add the following organization(s)

26. Name of each previously reported organization that is NO LONGER affiliated with the registrant or client

FOREIGN ENTITIES

27. Add the following foreign entities

28. Name of each previously reported foreign entity the NO LONGER owns, OR controls, OR is affiliated with the registrant, client or affiliated organization

Signature: ON FILE Date: Feb 14, 2008

Printed Name and Title: -