

Clerk of the House of Representatives
Legislative Resource Center
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Washington, DC 20510

SECRETARY OF THE SENATE

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LOBBYING REPORT

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

1. Registrant Name Loeffler, Jonas & Tuggey, LLP			
2. Address <input type="checkbox"/> Check if different than previously reported 700 N. St. Mary's Street, Suite 800			
3. Principal Place of Business (if different from line 2) City: San Antonio State/Zip (or Country) Texas 78205			
4. Contact Name	Telephone	E-mail (optional)	5. Senate ID #
W. James Jonas, III	210/354-4300		64634-214
7. Client Name <input type="checkbox"/> Self			6. House ID #
Investment Company Institute			35548006

TYPE OF REPORT 8. Year 2001 Midyear (January 1-June 30) OR Year End (July 1-Decen

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	13. Organizations
INCOME relating to lobbying activities for this reporting period was: Less than \$10,000 <input checked="" type="checkbox"/> \$10,000 or more <input type="checkbox"/> ⇒ \$ _____ 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).	EXPENSES relating to lobbying activities for this reporting period were: Less than \$10,000 <input type="checkbox"/> \$10,000 or more <input type="checkbox"/> ⇒ \$ _____ Expenses (nearest \$20,000) 14. REPORTING METHOD. Check box to indicate accounting method. See instructions for description of <input type="checkbox"/> Method A. Reporting amounts using LDA definition <input type="checkbox"/> Method B. Reporting amounts under section 6033(e) Internal Revenue Code <input type="checkbox"/> Method C. Reporting amounts under section 162(e) Internal Revenue Code

Signature _____

Printed Name and Title

W. James Jonas, III, Partner



Registrant Name Loeffler, Jonas & Tuggey, LLP Client Name Investment Company Institute

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

Issues relating to tax policy

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

Check if None

House, Senate

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

Name	Covered Official Position (if applicable)
Tom Loeffler	
Dan Cohen	

19. Interest of each foreign entity in the specific issues listed on line 16 above

Check if None

Signature  Date 13 Aug 20

Printed Name and Title W. James Jonas, III, Partner

