

01 FEB 14 AM 11:38

LOBBYING REPORT

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

1. Registrant Name Independent Insurance Agents of America, Inc.			
2. Address <input type="checkbox"/> Check if different than previously reported 127 S. Peyton Street, Alexandria, VA 22314			
3. Principal Place of Business (if different from line 2) City: Washington State/Zip (or Country) DC 20003			
4. Contact Name Lene Stallings	Telephone 202-863-7000	E-mail (optional)	5. Senate ID # 19228
7. Client Name <input checked="" type="checkbox"/> Self			6. House ID # 32000000

TYPE OF REPORT 8. Year 2000 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	
<p>12. Lobbying Firms</p> <p>INCOME relating to lobbying activities for this reporting period was:</p> <p>Less than \$10,000 <input type="checkbox"/></p> <p>\$10,000 or more <input type="checkbox"/> -> \$ _____ <small>Income (nearest \$20,000)</small></p> <p>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).</p>	<p>13. Organizations</p> <p>EXPENSES relating to lobbying activities for this reporting period were:</p> <p>Less than \$10,000 <input type="checkbox"/></p> <p>\$10,000 or more <input checked="" type="checkbox"/> -> \$ <u>400,000.00</u> <small>Expenses (nearest \$20,000)</small></p> <p>14. REPORTING METHOD. Check box to indicate expense accounting method. See instructions for description of options.</p> <p><input type="checkbox"/> Method A. Reporting amounts using LDA definitions only</p> <p><input type="checkbox"/> Method B. Reporting amounts under section 6033(b)(8) of the Internal Revenue Code</p> <p><input checked="" type="checkbox"/> Method C. Reporting amounts under section 162(e) of the Internal Revenue Code</p>

Signature _____

Printed Name and Title _____

Registrant Name ITAA 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 pages, as needed.

5. General issue area code AGR (one per page)

16. Specific lobbying issues

- H.R. 4461/S. 2536 - FY 2001 Agriculture Appropriations Bill
- H.R. 2559 - The Agriculture Risk Protection Act
- S. 1580 - Crop Insurance for the 21st Century Act
- S. 1108 - Crop Insurance Equity Act of 1999
- S. 1666 - Farmers Risk Management Act of 1999

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

- U.S. House of Representatives
- U.S. Senate
- U.S. Department of Agriculture

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

Name	Covered Official Position (if applicable)	Ne
Thomas C. McCrocklin	Director, Federal Affairs	<input type="checkbox"/>
Robert A. Rusbuidt	Executive Vice President	<input type="checkbox"/>
Maria L. Berthoud	Vice President, Federal Gov't Affairs	<input type="checkbox"/>
Paul A. Equale	Chief Executive Officer	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

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

Signature _____ Date _____

Printed Name and Title _____

Registrant Name IIAA 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

H.R. 10/S. 900 - Financial Services Modernization Act of 1999

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

U.S. House of Representatives
U.S. Senate
Office of the Comptroller of the Currency (OCC)
U.S. Department of the Treasury

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

Name	Covered Official Position (if applicable)	Net
Robert A. Rusbuldt	Executive Vice President	<input type="checkbox"/>
Maria L. Berthoud	Vice President, Federal Gov't Affairs	<input type="checkbox"/>
Thomas C. McCrocklin	Director, Federal Affairs	<input type="checkbox"/>
Paul A. Equale	Chief Executive Officer	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

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

Signature _____ Date _____

Printed Name and Title _____

Registrant Name ITAA Client Name Self

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15. General issue area code CSP (one per page)

16. Specific lobbying issues

H.R. 987/S. 1070 - Workplace Preservation Act

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

U.S. House of Representatives
U.S. Senate

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

Name	Covered Official Position (if applicable)	New
Maria L. Berthoud	Vice President, Federal Gov't Affairs	<input type="checkbox"/>
Robert A. Rusbuldt	Executive Vice President	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

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

Signature _____ Date _____

Printed Name and Title _____

Registrant Name TIAA 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 DIS (one per page)

16. Specific lobbying issues

H.R. 21 - Homeowners Insurance Availability Act of 1999
S. 1361 - Natural Disaster Protection & Insurance Act of 1999
H.R. 2749 - Natural Disaster Protection & Insurance Act of 1999

17. Houses of Congress and Federal agencies contacted Check if None

U.S. House of Representatives
U.S. Senate
U.S. Department of the Treasury

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

Name	Covered Official Position (if applicable)	New
Thomas C. McCrocklin	Director, Federal Affairs	<input type="checkbox"/>
Maria L. Berthoud	Vice President, Federal Gov't Affairs	<input type="checkbox"/>
Robert A. Rusbuldt	Executive Vice President	<input type="checkbox"/>
Paul A. Equale	Chief Executive Officer	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

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

Signature _____ Date _____

Printed Name and Title _____

Registrant Name IIAA Client Name Self

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15. General issue area code HCR (one per page)

16. Specific lobbying issues

- H.R. 358/S. 6 - Patients' Bill of Rights Act of 1999
- S. 1344 - Patients' Rights Bill
- H.R. 2990 - Patients' Bill of Rights
- H.R. 4585 - Medical Financial Privacy Protection Act
- H.R. 4049 - Privacy Commission Act
- H.R. 1304 - Quality Health-Care Coalition Act of 2000
- H.R. 3872 - Long Term Care & Retirement Security Act of 2000

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

U.S. House of Representatives
U.S. Senate

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

Name	Covered Official Position (if applicable)	New
Maria L. Berthoud	Vice President, Federal Gov't Affairs	<input type="checkbox"/>
Robert A. Rusbuidt	Executive Vice President	<input type="checkbox"/>
Paul A. Equale	Chief Executive Officer	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

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

Signature _____ Date _____

Printed Name and Title _____

Registrant Name IJAA 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 pages as needed.

15. General issue area code INS (one per page)

16. Specific lobbying issues

S. 1185/H.R. 2366 - Small Business Liability Reform Act of 1999

"Insurance Uniformity"

17. Houses of Congress and Federal agencies contacted Check if None

U.S. House of Representatives
U.S. Senate

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

Name	Covered Official Position (if applicable)	New
Maria L. Berthoud	Vice President, Federal Gov't Affairs	<input type="checkbox"/>
Robert A. Rusbult	Executive Vice President	<input type="checkbox"/>
Thomas C. McCrocklin	Director, Federal Affairs	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

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

Signature _____ Date _____

Printed Name and Title _____

Registrant Name TIAA Client Name Self

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5. General issue area code MM (one per page)

16. Specific lobbying issues

H.R. 614/S. 1350 - Medical Savings Accounts Improvement Act of 1999

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

U.S. House of Representatives
U.S. Senate

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

Name	Current Official Position (if applicable)	Next
Maria L. Berthoud	Vice President, Federal Gov't. Affairs	<input type="checkbox"/>
Robert A. Rusbuldt	Executive Vice President	<input type="checkbox"/>
Paul A. Equale	Chief Executive Officer	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

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

Signature _____ Date _____

Printed Name and Title _____

Registrant Name IJAA 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 pages, as needed.

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

16. Specific lobbying issues
- H.R. 4810 - Marriage Penalty
 - H.R. 3081 - Small Business Tax Fairness Act
 - H.R. 3832 - The Small Business Tax Fairness Act
 - s. 1342 - To Repeal Federal Estate & Gift Taxes
 - H.R. 86 - Family Heritage Preservation Act
 - S. 1128 - Estate Tax Elimination Act of 1999
 - H.R. 8 - Death Tax Elimination Act
 - H.R. 1180 - Ticket to Work and Work Incentives Improvement Act of 1999
 - H.R. 3594/S. 2005 - Installment Tax Correction Act
- H.R. 1593 - Former Insurance Agents Tax Equity Act of 1999

17. Houses of Congress and Federal agencies contacted Check if None

U.S. House of Representatives
U.S. Senate

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

Name	Covered Official Position (if applicable)	New
Maria L. Berthoud	Vice President, Federal Gov't Affairs	<input type="checkbox"/>
Robert A. Rusboldt	Executive Vice President	<input type="checkbox"/>
Paul A. Equale	Chief Executive Officer	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

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

Signature _____ Date _____

Printed Name and Title _____

Registrant Name TTAA Client Name Self

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15. General issue area code TEC (one per page)

16. Specific lobbying issues

H.R. 1714 - Electronic Signatures in Global & National Commerce Act
S. 761 - Millennium Digital Commerce Act

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

U.S. House of Representatives
U.S. Senate

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

Name	Covered Official Position (if applicable)	New
<u>Maria L. Berthoud</u>	<u>Vice President, Federal Gov't Affairs</u>	<input type="checkbox"/>
<u>Thomas C. McCrocklin</u>	<u>Director, Federal Affairs</u>	<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

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

Signature Robert A. Rusbuldt Date February 13, 2001

Printed Name and Title Robert A. Rusbuldt
Executive Vice President & Chief Operating Officer