

## LOBBYING REPORT

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

1. Registrant Name:

**CUNA MUTUAL INSURANCE SOCIETY**

2. Address:

PO BOX 391 MAIL STOP 5910 4 C5+1, MADISON, WI 53701

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

4. Contact Name: JAMES L. CARNEY

Telephone: 608-231-8853

E-mail (optional): jim.carney@cunamutual.com

Senate ID #: 80510-12

House ID #:

7. Client Name:  Self

## TYPE OF REPORT

8. Year 2003 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): 100,000.00

### 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: CUNA MUTUAL INSURANCE SOCIETY 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: FIN (one per page)

16. Specific lobbying issues:

Financial Services Regulatory Relief Act of 2003 (H.R. 1375): expanded powers for credit unions SEC proposal to modify broker/dealer registration exemption for credit union service organizations (CUSOs) and to extend exemptions to credit unions to same extent as granted to banks and thrifts. Fair and Accurate Credit Transactions Act of 2003 (H.R. 2622): extension of expiring Fair Credit Reporting Act preemption provisions and new credit reporting requirements. Expand authority of federal credit unions to acquire secondary capital and permit its use to help meet prompt corrective action (PCA) standards promulgated by NCUA.

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

HOUSE OF REPRESENTATIVES  
Natl Credit Union Administration (NCUA)  
Securities & Exchange Commission (SEC)

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

Name: BLANCHARD, LARRY  
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: CUNA MUTUAL INSURANCE SOCIETY 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: TAX (one per page)

16. Specific lobbying issues:

Life Insurance Tax Simplification Act of 2003 (H.R. 808, S. 992), Jobs & Growth Tax Relief Reconciliation Act of 2003 (H.R. 2, S. 1054); IRC Sec. 809: repeal or permanent suspension of tax measure applicable to mutual life insurance companies. IRC Sec. 511-513: relating to taxation of unrelated business income for state-chartered credit unions.

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

HOUSE OF REPRESENTATIVES

Internal Revenue Service (IRS)

SENATE

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

Name: BLANCHARD, LARRY

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: CUNA MUTUAL INSURANCE SOCIETY 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: TOR (one per page)

16. Specific lobbying issues:

Class Action Reform Act of 2003 (H.R. 1115, S. 274); reduce abuses in class action litigation. Help, Efficient, Accessible, Low-Cost, Timely Healthcare (HEALTH) Act of 2003 (H.R. 5); set limits on medical malpractice liability for noneconomic damages.

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: BLANCHARD, LARRY

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: Aug 08, 2003

Printed Name and Title: JAMES L. CARNEY - DIR, GOVERNMENT AND POLITICAL AFFAIRS

**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**

**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: Aug 08, 2003

Printed Name and Title: -