

Clerk of the House of Representatives  
Legislative Resource Center  
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Washington, DC 20515

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Washington, DC 20510

SECRETARY OF THE SENATE

00 FEB 14 PM 4:53

# LOBBYING REPORT

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

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

TYPE OF REPORT 8. Year 1999 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	13. Organizations
INCOME relating to lobbying activities for this reporting period was: Less than \$10,000 <input type="checkbox"/> \$10,000 or more <input type="checkbox"/> \$ _____ <small>Income (nearest \$20,000)</small>	EXPENSES relating to lobbying activities for this reporting period were: Less than \$10,000 <input type="checkbox"/> \$10,000 or more <input checked="" type="checkbox"/> \$ <u>410,920.00</u> <small>Expenses (nearest \$20,000)</small>
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).	14. REPORTING METHOD. Check box to indicate expense accounting method. See instructions for description of options. <input type="checkbox"/> Method A. Reporting amounts using LDA definitions only <input type="checkbox"/> Method B. Reporting amounts under section 6033(b)(8) of the Internal Revenue Code <input checked="" type="checkbox"/> Method C. Reporting amounts under section 162(e) of the Internal Revenue Code

Signature \_\_\_\_\_

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 AGR (one per page)

16. Specific lobbying issues

- H.R. 1906/S. 1233 - FY 2000 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. Houses 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)	New
Thomas C. McCrocklin	Director, Federal Affairs	<input type="checkbox"/>
Robert A. Rusboldt	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 AUT (one per page)

16. Specific lobbying issues

S. 837 - Auto Choice Reform Act of 1999  
H.R. 1475 - Auto Choice Reform 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	Covered Official Position (if applicable)	New
Maria L. Berthoud	Vice President, Federal Gov't Affairs	<input type="checkbox"/>
		<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 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.

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)	New
Robert A. Rusbult	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 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 CSP (one per page)

16. Specific lobbying issues

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

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. 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 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 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. House(s) 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 UAA 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 ENV (one per page)

16. Specific lobbying issues

H.R. 1300 - Recycle America's Land Act of 1999  
S. 1090 - Superfund Program Completion 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	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 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 pages if as needed.

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

16. Specific lobbying issues

- H.R. 2095 - Health Care Quality Access Act of 1999
- H.R. 2047 - Small Business Access & Choice for Entrepreneurs Act of 1999
- H.R. 358/S. 5 - Patients' Bill of Rights Act of 1999
- S. 1344 - Patients' Rights Bill
- H.R. 2723 - To Amend Employee Retirement Income Security Act of 1974 -  
to protect consumers in managed care plans

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"/>
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 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 IMS (one per page)

16. Specific lobbying issues

- S. 1185/H.R. 2366 - Small Business Liability Reform Act of 1999
- H.R. 179 - Businesses Undergoing the Glitch Act
- H.R. 775 - Year 2000 Readiness & Responsibility Act
- S. 96 - Y2K Act
- S. 461 - Year 2000 Fairness & Responsibility 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. 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"/>
		<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 MMM (one per page)

16. Specific lobbying issues

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

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

16. Specific lobbying issues

- S. 1342 - To Repeal Federal Estate & Gift Taxes
- H.R. 2488 - Financial Freedom Act of 1999
- 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

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"/>

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 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
Maria L. Berthoud	Vice President, Federal Gov't Affairs	<input type="checkbox"/>
Thomas C. McCrocklin	Director, Federal Affairs	<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 IIAA Client Name Self

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

20. Client new address

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

City

State/Zip (or 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 client

**ISSUE UPDATE**

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

**AFFILIATED ORGANIZATIONS**

25. Add the following affiliated organization(s)

Name	Address	Principal Place of Business (city and state or country)

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

Name	Address	Principal place of business (city and state or country)	Amount of contribution for lobbying activities	Ownership percentage in client

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

Signature Robert Pullitt Date 2/11/00

Printed Name and Title Executive Vice President