

Clerk of the House of Representatives Legislative Resource Center B-106 Cannon Building Washington, DC 20515	Secretary of the Senate Office of Public Records 232 Hart Building Washington, DC 20510
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SECRET

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LOBBYING REPORT

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

1. Registrant Name Ricchetti Incorporated			
2. Address <input checked="" type="checkbox"/> Check if different than previously reported 1001 G Street NW, Suite 600 East			
3. Principal Place of Business (if different from line 2) Washington DC 20001 City: State/zip (or Country)			
4. Contact Name	Telephone	E-mail (optional)	5. Senate ID #
James Heimbach	(202) 879-9367		62778-517
7. Client Name <input type="checkbox"/> Self Association for Advanced Life Underwriting (AALU)			6. House ID # 35395022

TYPE OF REPORT 8. Year 2004 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 **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:	EXPENSES relating to lobbying activities for this reporting period were:
Less than \$10,000 <input type="checkbox"/>	Less than \$10,000 <input type="checkbox"/>
\$10,000 or more <input checked="" type="checkbox"/> ⇨ \$ <u>\$120,000.00</u> Income (nearest \$20,000)	\$10,000 or more <input type="checkbox"/> ⇨ \$ _____ Expenses (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).	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 definitive accounting method.
	<input type="checkbox"/> Method B. Reporting amounts under section 6033(c) Internal Revenue Code
	<input type="checkbox"/> Method C. Reporting amounts under section 162(e) Internal Revenue Code


Date 8/9/04

Signature

James Heimbach, Vice President

Printed Name and Title

LD-2 (REV. 4/03)

PAGE 1 of

Registrant Name Ricchetti Incorporated Client Name Association for Advanced Life Underwriting (AAL

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

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

16. Specific lobbying issues

Issues affecting estate taxes, corporate and investor HSAs, RSAs and ERSAs and deferred compensation plans.
FSC/ETI
Proposed budget agreement
S 13 - the Death Tax Fairness Act
the Nickles proposal to reform estate taxes
Budget agreements to accelerate estate tax repeal by one year to 2009

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

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

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

Name	Covered Official Position (if applicable)
Steve Ricchetti	
Jeff Ricchetti	
Lisa Kountoupes	
James Heimbach	

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

Signature _____ Date 8/9/04

Printed Name and Title _____

Form LD-2 (Rec. 4/03)

Page 2

Registrant Name Ricchetti Incorporated Client Name Association for Advanced Life Underwriting (AALU)

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

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

16. Specific lobbying issues

Bingaman/Conrad amendment to the National Employee Savings and Trust Equity Guarantee Act - issues pertaining to requirements regarding the maximum face amount of life insurance contracts employers may take out


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

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

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

Name	Covered Official Position (if applicable)
Steve Ricchetti	
Jeff Ricchetti	
Lisa Kountoupes	
James Heimbach	

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

Signature  Date 8/9/04

Printed Name and Title

JAMES HENNINGSEN, VICE PRESIDENT

Form LD-2 (Rev. 4/03)

Page 3