

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

SECRETARY OF THE SENATE
03 AUG 18 AM 11:51

LOBBYING REPORT

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

1. Registrant Name <u>The Michael Lewan Company</u>			
2. Address <input type="checkbox"/> Check if different than previously reported <u>1201 Pennsylvania Ave NW Suite 315</u>			
3. Principal Place of Business (if different from line 2) City: <u>Washington</u> State/Zip (or Country) <u>D.C. 20004</u>			
4. Contact Name <u>Michael Lewan</u>	Telephone <u>(202) 347-2222</u>	E-mail (optional)	5. Senate ID # <u>22746</u>
7. Client Name <input type="checkbox"/> Self <u>The Phoenix Companies</u>			6. House ID # <u>33791</u>

TYPE OF REPORT 8. Year 2003 Midyear (January 1-June 30) ☒ OR Year End (July 1-Dec)

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
INCOME relating to lobbying activities for this reporting period was:
Less than \$10,000 ☐
\$10,000 or more ☒ ⇨ \$ 120,000
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)
14. REPORTING METHOD. Check box to indicate accounting method. See instructions for description of method.
☐ Method A. Reporting amounts using LDA definition
☐ Method B. Reporting amounts under section 60 Internal Revenue Code
☐ Method C. Reporting amounts under section 11 Internal Revenue Code

Signature 

Printed Name and Title Michael Lewan, President

Registrant Name Michael Lewan Co Client Name Phoenix Companies

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

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

16. Specific lobbying issues

All issues / legislation pertaining to tax and budget incl but not limited to:

Jobs and Growth Tax Relief and Reconciliation Act of 2003: H
: Dividend Exclusion, Deduction, Capital Gains
Pension Reform H.R. 1776 Portman - Carden
Estate Tax H.R. 8 Lifetime Annuity Payor - H.R. 269
Split dollar / COLI regulations

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

United States Senate
United States House of Representatives

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

Name	Covered Official Position (if applicable)
Michael Lewan	
Anne Saunders	

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

☒ Check if None

Signature Michael Lewan Date 8/4/03

Printed Name and Title MICHAEL LEWAN, PRESIDENT

Registrant Name Michael Lewan Co Client Name Phoenix Companies

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

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

16. Specific lobbying issues

All issues / legislation pertaining to financial services incl but not limited to: Jobs and Growth Tax Act 2003: HR. 2, S. 2
 Pension Reform: H.R. 1776 Estate Tax H.R. 8
 Lifetime Annuity Payout: H.R. 269 Split dollar / COLI regulations
 Optional Federal Charter

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

☐ Check if None

United States Senate
 United States House of Representatives

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

Name	Covered Official Position (if applicable)
Michael Lewan	
Anne Saunders	

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

☒ Check if None

Signature Michael Lewan Date 8/4/03

Printed Name and Title 1 MICHAEL LEWIS, 1 RESIDENT