

# Insurance and Financial Advisors Political Action Committee -- Virginia

Reporting Period: 04/01/2023 Through: 06/30/2023  
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| Schedule A: Direct Contributions Over \$100<br>Full Name of Contributor<br>Mailing Address of Contributor | Donor Information<br>1. Employer or Business (If Corporate/Company Donor: N/A)<br>2. Type of Business(If Corporate Donor Type of Business)<br>3. Business Location | Date Received | Contribution This Period | Aggregate To Date |
|---|--|---------------|--------------------------|-------------------|
| Campbell, Susan M<br>9200 Corporate Blvd<br>Suite 390<br>Rockville, MD 20850                              | 1.Disability Insurance Quotes<br>2.insurance sales<br>3.Rockville MD   | 06/13/2023    | \$20.00                  | \$120.00          |
| Duni, John D<br>14601 Castleford Ct<br>Midlothian, VA 23113   | 1.Financial Services of Virginia<br>2.insurance sales<br>3.Midlothian VA   | 04/19/2023    | \$40.00                  | \$160.00          |
| Heese, Bentley<br>2326 Mountainbrook Dr<br>Richmond, VA 23233   | 1.Ash Brokerage<br>2.insurance sales<br>3.Richmond VA  | 05/22/2023    | \$120.00                 | \$120.00          |
| Howard, Peter K<br>326 Rosemary Lane<br>Danville, VA 24540  | 1.self<br>2.insurance sales<br>3.Danville VA   | 06/13/2023    | \$16.80                  | \$100.80          |
| Jacobs, James A<br>11313 Laurel Cove Lane<br>Chesterfield, VA 23838                                       | 1.Milestone Financial Solutions<br>2.insurance sales<br>3.Chesterfield VA  | 04/06/2023    | \$150.00                 | \$150.00          |
| Ngo, Phu<br>801 N Harrison St<br>Arlington, VA 22205  | 1.NAIFA<br>2.VP Technology<br>3.Arlington VA   | 05/22/2023    | \$120.00                 | \$120.00          |
| Patterson, John R<br>2510 Liesfeld Pkwy<br>Glen Allen, VA 23060   | 1.State Farm<br>2.insurance sales<br>3.Richmond VA   | 05/02/2023    | \$120.00                 | \$120.00          |
| Puffenbarger, Keith W<br>17273 Berkshire Dr<br>Jeffersonton, VA 22724                                     | 1.Nationwide<br>2.insurance sales<br>3.Warrenton VA  | 05/15/2023    | \$40.00                  | \$120.00          |
| Puffenbarger, Keith W<br>17273 Berkshire Dr<br>Jeffersonton, VA 22724                                     | 1.Nationwide<br>2.insurance sales<br>3.Warrenton VA  | 06/15/2023    | \$40.00                  | \$160.00          |
| Scruggs, Frederick T<br>1113 Blue Heron Cir<br>Forest, VA 24551   | 1.Financial Designs<br>2.insurance sales<br>3.Forest VA  | 05/05/2023    | \$120.00                 | \$120.00          |
| Webb, Charles A<br>2670 Electric Rd<br>Roanoke, VA 24018  | 1.Innovative Insurance Group<br>2.insurance sales<br>3.Roanoke VA  | 04/11/2023    | \$33.60                  | \$134.40          |
| Webb, Charles A<br>2670 Electric Rd<br>Roanoke, VA 24018  | 1.Innovative Insurance Group<br>2.insurance sales<br>3.Roanoke VA  | 05/10/2023    | \$33.60                  | \$168.00          |

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|---|--|------------------|-----------------------------|----------------------|
| Webb, Charles A<br>2670 Electric Rd<br>Roanoke, VA 24018  | 1.Innovative Insurance Group<br>2.insurance sales<br>3.Roanoke VA  | 06/13/2023       | \$33.60                     | \$201.60             |
| Winfield, Brian P<br>3954 Ocean Hills Ct<br>Virginia Beach, VA 23451                                      | 1.New York Life<br>2.insurance sales<br>3.Virginia Beach VA  | 06/13/2023       | \$20.00                     | \$120.00             |
| Total This Period   |  |                  | \$907.60                    |                      |

No Schedule B results to display.

No Schedule C results to display.

No Schedule D results to display.

No Schedule E-1 results to display.

No Schedule E-2 results to display.

No Schedule F results to display.



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| <b>Schedule G: Statement of Funds</b>                          | <b>Number of Contributions</b> | <b>Amount</b> |                   |
|--|--------------------------------|---------------|-------------------|
| <b>Contributions Received This Period</b>                      |                                |               |                   |
| 1. Schedule A [Over \$100]                                     | 14                             | \$907.60      |                   |
| 2. Schedule B [Over \$100]                                     | 0                              | \$0.00        |                   |
| 3. Un-itemized Cash Contributions [\$100 or less]              | 68                             | \$825.80      |                   |
| 4. Un-itemized In-Kind Contributions [\$100 or less]           | 0                              | \$0.00        |                   |
| <b>5. Total</b>  | <b>82</b>                      |               | <b>\$1,733.40</b> |
| <b>Bank Interest, Refunded Expenditures and Rebates</b>        |                                |               |                   |
| <b>6. Schedule C [also enter on Line 17b on Schedule H]</b>    |                                |               | <b>\$0.00</b>     |
| <b>Expenditures Made This Period</b>                           |                                |               |                   |
| 7. Schedule B [From line 2 Above]                              |                                | \$0.00        |                   |
| 8. Un-itemized In-Kind contributions [From line 4 Above]       |                                | \$0.00        |                   |
| 9. Schedule D [Expenditures]                                   |                                | \$0.00        |                   |
| <b>10. Total [add lines 7, 8 and 9]</b>                        |                                |               | <b>\$0.00</b>     |
| <b>Reconciliation of Loan Account</b>                          |                                |               |                   |
| 11. Beginning loan balance [from line 15 of last report]       |                                | \$0.00        |                   |
| 12. Loans received this period [from Schedule E-Part 1]        |                                | \$0.00        |                   |
| <b>13. Subtotal</b>  |                                |               | <b>\$0.00</b>     |
| 14. Subtract: Loans repaid this period [from Schedule E-Part2] |                                | \$0.00        |                   |
| <b>15. Ending loan balance</b>                                 |                                |               | <b>\$0.00</b>     |

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|  |            |                    |                    |
|--|------------|--------------------|--------------------|
| <b>Schedule H: Summary of Receipts and Disbursements</b>                   |            |                    |                    |
| <b>16. Beginning Balance [Line 19 of last Report]</b>                      |            | <b>\$91,682.66</b> |                    |
| <b>17. Receipts for Current Reporting Period:</b>                          |            |                    |                    |
| a. Contributions received this period [Line 5 of Schedule G]               | \$1,733.40 |                    |                    |
| b. Bank interest, refunded expenditures and rebates [Line 6 of Schedule G] | \$0.00     |                    |                    |
| c. Loans received this period [Line 12 of Schedule G]                      | \$0.00     |                    |                    |
| d. Subtotal: Contributions and Receipts received this period               |            | \$1,733.40         |                    |
| <b>e. Total Expendable Funds [Add Linds 16 and 17d]</b>                    |            |                    | <b>\$93,416.06</b> |
| <b>18. Disbursements for Current Reporting Period</b>                      |            |                    |                    |
| a. Expenditures made this reporting period [Line 10 of Schedule G]         | \$0.00     |                    |                    |
| b. Loans repaid this reporting period [Line 14 of Schedule G]              |            | \$0.00             |                    |
| c. Other surplus funds paid out [from Schedule I]                          |            | \$0.00             |                    |
| d. Total Payments Made [Add lines 18a,18b, and 18c]                        |            |                    | \$0.00             |
| <b>19. Ending Balance [Subtract Line 18b from Line 17e]</b>                |            |                    | <b>\$93,416.06</b> |
| 20. Total Unpaid Debts [from Schedule F of this report]                    | \$0.00     |                    |                    |
| <b>Committee's Receipts and Disbursements - Election Cycle</b>             |            |                    |                    |
| 21. Balance at Start of Election Cycle                                     |            | \$91,260.24        |                    |
| 22. Previous Receipts [Line 24 from last report]                           | \$1,529.40 |                    |                    |
| 23. Receipts from Current Reporting Previous [Line 17d above]              | \$1,733.40 |                    |                    |
| 24. Total Receipts this Election Cycle [Add lines 22 and 23]               |            | \$3,262.80         |                    |
| <b>25. Total Funds Available [Add lines 21 and 24]</b>                     |            |                    | <b>\$94,523.04</b> |
| 26. Previous Disbursements [Line 28 from last report]                      | \$1,106.98 |                    |                    |
| 27. Disbursements from Current Reporting Period [Line 18d above]           | \$0.00     |                    |                    |
| <b>28. Total Disbursements this Election Cycle</b>                         |            |                    | <b>\$1,106.98</b>  |
| <b>29. Ending Balance</b>  |            |                    | <b>\$93,416.06</b> |