

Insurance and Financial Advisors Political Action Committee -- Virginia

Reporting Period: 10/08/2023 Through: 12/31/2023

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| Schedule A: Direct Contributions Over \$100 Full Name of Contributor Mailing Address of Contributor | Donor Information 1. Employer or Business (If Corporate/Company Donor: N/A) 2. Type of Business(If Corporate Donor Type of Business) 3. Business Location | Date Received | Contribution This Period | Aggregate To Date |
|---|--|---------------|--------------------------|-------------------|
| Birkel, Stuart J 611 Raleigh Ave Norfolk, VA 23507 | 1.New York Life 2.insurance sales 3.Norfolk VA | 11/10/2023 | \$10.00 | \$110.00 |
| Birkel, Stuart J 611 Raleigh Ave Norfolk, VA 23507 | 1.New York Life 2.insurance sales 3.Norfolk VA | 12/12/2023 | \$10.00 | \$120.00 |
| Campbell, Susan M 9200 Corporate Blvd Suite 390 Rockville, MD 20850 | 1.Disability Insurance Quotes 2.insurance sales 3.Rockville MD | 10/10/2023 | \$20.00 | \$200.00 |
| Campbell, Susan M 9200 Corporate Blvd Suite 390 Rockville, MD 20850 | 1.Disability Insurance Quotes 2.insurance sales 3.Rockville MD | 11/10/2023 | \$20.00 | \$220.00 |
| Campbell, Susan M 9200 Corporate Blvd Suite 390 Rockville, MD 20850 | 1.Disability Insurance Quotes 2.insurance sales 3.Rockville MD | 12/12/2023 | \$20.00 | \$240.00 |
| Denny, James R 8707 Standish Ln Richmond, VA 23229 | 1.AXA Advisors LLC 2.insurance sales 3.Richmond VA | 11/10/2023 | \$10.00 | \$110.00 |
| Denny, James R 8707 Standish Ln Richmond, VA 23229 | 1.AXA Advisors LLC 2.insurance sales 3.Richmond VA | 12/12/2023 | \$10.00 | \$120.00 |
| Garcia, Michael A 5228 11th St N Arlington, VA 22205 | 1.State Farm 2.insurance sales 3.Arlington VA | 11/10/2023 | \$10.00 | \$110.00 |
| Garcia, Michael A 5228 11th St N Arlington, VA 22205 | 1.State Farm 2.insurance sales 3.Arlington VA | 12/12/2023 | \$10.00 | \$120.00 |
| Harvey, James Y 3829 Peakland Pl Lynchburg, VA 24503 | 1.State Farm Insurance 2.insurance sales 3.Lynchburg VA | 10/10/2023 | \$12.00 | \$120.00 |
| Harvey, James Y 3829 Peakland Pl Lynchburg, VA 24503 | 1.State Farm Insurance 2.insurance sales 3.Lynchburg VA | 11/10/2023 | \$12.00 | \$132.00 |
| Harvey, James Y 3829 Peakland Pl Lynchburg, VA 24503 | 1.State Farm Insurance 2.insurance sales 3.Lynchburg VA | 12/12/2023 | \$12.00 | \$144.00 |

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|---|--|---------------|--------------------------|-------------------|
| Heese, Bentley 2326 Mountainbrook Dr Richmond, VA 23233 | 1.Ash Brokerage 2.insurance sales 3.Richmond VA | 12/03/2023 | \$120.00 | \$240.00 |
| Howard, Peter K 326 Rosemary Lane Danville, VA 24540 | 1.self 2.insurance sales 3.Danville VA | 10/10/2023 | \$16.80 | \$168.00 |
| Howard, Peter K 326 Rosemary Lane Danville, VA 24540 | 1.self 2.insurance sales 3.Danville VA | 11/10/2023 | \$16.80 | \$184.80 |
| Howard, Peter K 326 Rosemary Lane Danville, VA 24540 | 1.self 2.insurance sales 3.Danville VA | 12/12/2023 | \$16.80 | \$201.60 |
| Platt, Joseph B 1567 Heathrow Ln Keswick, VA 22947 | 1.Platt Financial 2.insurance sales 3.Charlottesville VA | 11/10/2023 | \$10.00 | \$110.00 |
| Platt, Joseph B 1567 Heathrow Ln Keswick, VA 22947 | 1.Platt Financial 2.insurance sales 3.Charlottesville VA | 12/12/2023 | \$10.00 | \$120.00 |
| Puffenbarger, Keith W 17273 Berkshire Dr Jeffersonton, VA 22724 | 1.Nationwide 2.insurance sales 3.Warrenton VA | 10/15/2023 | \$40.00 | \$320.00 |
| Puffenbarger, Keith W 17273 Berkshire Dr Jeffersonton, VA 22724 | 1.Nationwide 2.insurance sales 3.Warrenton VA | 11/15/2023 | \$40.00 | \$360.00 |
| Puffenbarger, Keith W 17273 Berkshire Dr Jeffersonton, VA 22724 | 1.Nationwide 2.insurance sales 3.Warrenton VA | 12/15/2023 | \$40.00 | \$400.00 |
| Raddatz, Thomas J 2125 Indian Creek Rd Chesapeake, VA 23322 | 1.New York Life 2.insurance sales 3.Norfolk VA | 11/10/2023 | \$10.00 | \$110.00 |
| Raddatz, Thomas J 2125 Indian Creek Rd Chesapeake, VA 23322 | 1.New York Life 2.insurance sales 3.Norfolk VA | 12/12/2023 | \$10.00 | \$120.00 |
| Scott, Paul A 10101 Terrace Ct Fredericksburg, VA 22408 | 1.Scott Insurance 2.insurance sales 3.Fredericksburg VA | 10/10/2023 | \$20.00 | \$120.00 |

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|---|--|---------------|--------------------------|-------------------|
| Scott, Paul A 10101 Terrace Ct Fredericksburg, VA 22408 | 1.Scott Insurance 2.insurance sales 3.Fredericksburg VA | 11/10/2023 | \$20.00 | \$140.00 |
| Scott, Paul A 10101 Terrace Ct Fredericksburg, VA 22408 | 1.Scott Insurance 2.insurance sales 3.Fredericksburg VA | 12/10/2023 | \$20.00 | \$160.00 |
| Villanueva, Lisa I 5137 Crystal Point Dr Virginia Beach, VA 23455 | 1.Villanueva Agency 2.insurance sales 3.Virginia Beach VA | 11/10/2023 | \$10.00 | \$110.00 |
| Villanueva, Lisa I 5137 Crystal Point Dr Virginia Beach, VA 23455 | 1.Villanueva Agency 2.insurance sales 3.Virginia Beach VA | 12/12/2023 | \$10.00 | \$120.00 |
| Webb, Charles A 2670 Electric Rd Roanoke, VA 24018 | 1.Innovative Insurance Group 2.insurance sales 3.Roanoke VA | 10/10/2023 | \$33.60 | \$336.00 |
| Webb, Charles A 2670 Electric Rd Roanoke, VA 24018 | 1.Innovative Insurance Group 2.insurance sales 3.Roanoke VA | 11/10/2023 | \$33.60 | \$369.60 |
| Webb, Charles A 2670 Electric Rd Roanoke, VA 24018 | 1.Innovative Insurance Group 2.insurance sales 3.Roanoke VA | 12/12/2023 | \$33.60 | \$403.20 |
| White, Travis W 13406 Compton Rd Clifton, VA 20124 | 1.Travis White Agency 2.insurance sales 3.Clifton VA | 11/10/2023 | \$10.00 | \$110.00 |
| White, Travis W 13406 Compton Rd Clifton, VA 20124 | 1.Travis White Agency 2.insurance sales 3.Clifton VA | 12/12/2023 | \$10.00 | \$120.00 |
| Winfield, Brian P 3954 Ocean Hills Ct Virginia Beach, VA 23451 | 1.New York Life 2.insurance sales 3.Virginia Beach VA | 10/10/2023 | \$20.00 | \$200.00 |
| Winfield, Brian P 3954 Ocean Hills Ct Virginia Beach, VA 23451 | 1.New York Life 2.insurance sales 3.Virginia Beach VA | 11/10/2023 | \$20.00 | \$220.00 |
| Winfield, Brian P 3954 Ocean Hills Ct Virginia Beach, VA 23451 | 1.New York Life 2.insurance sales 3.Virginia Beach VA | 12/12/2023 | \$20.00 | \$240.00 |

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| Wolfe, Christopher W 1273 Gristmill Dr Charlottesville, VA 22902 | 1.Allstate Financial Services 2.insurance sales 3.Charlottesville VA | 11/10/2023 | \$10.00 | \$110.00 |
| Wolfe, Christopher W 1273 Gristmill Dr Charlottesville, VA 22902 | 1.Allstate Financial Services 2.insurance sales 3.Charlottesville VA | 12/12/2023 | \$10.00 | \$120.00 |
| Total This Period | | | \$767.20 | |

No Schedule B results to display.

No Schedule C results to display.

**Insurance and Financial Advisors Political
Action Committee -- Virginia**

| Schedule D: Expenditures Person or Company Paid and Address | Item or Service | Name of Person Authorizing Expenditure | Date of Expenditure | Amount Paid |
|---|---------------------------|---|------------------------|----------------|
| Harris, Harvey, Neal and Co P O Box 3424 Danville, VA 24543 | tax reporting preparation | Peter Howard | 12/15/2023 | \$340.00 |
| Total This Period | | | | \$340.00 |

No Schedule E-1 results to display.

No Schedule E-2 results to display.

No Schedule F results to display.

**Insurance and Financial Advisors Political
Action Committee -- Virginia**

| Schedule G: Statement of Funds | Number of Contributions | Amount | |
|--|--------------------------------|---------------|-----------------|
| Contributions Received This Period | | | |
| 1. Schedule A [Over \$100] | 38 | \$767.20 | |
| 2. Schedule B [Over \$100] | 0 | \$0.00 | |
| 3. Un-itemized Cash Contributions [\$100 or less] | 35 | \$216.20 | |
| 4. Un-itemized In-Kind Contributions [\$100 or less] | 0 | \$0.00 | |
| 5. Total | 73 | | \$983.40 |
| Bank Interest, Refunded Expenditures and Rebates | | | |
| 6. Schedule C [also enter on Line 17b on Schedule H] | | | \$0.00 |
| Expenditures Made This Period | | | |
| 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] | | \$340.00 | |
| 10. Total [add lines 7, 8 and 9] | | | \$340.00 |
| Reconciliation of Loan Account | | | |
| 11. Beginning loan balance [from line 15 of last report] | | \$0.00 | |
| 12. Loans received this period [from Schedule E-Part 1] | | \$0.00 | |
| 13. Subtotal | | | \$0.00 |
| 14. Subtract: Loans repaid this period [from Schedule E-Part2] | | \$0.00 | |
| 15. Ending loan balance | | | \$0.00 |

**Insurance and Financial Advisors Political
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| Schedule H: Summary of Receipts and Disbursements | | | |
|--|-------------|--------------------|--------------------|
| 16. Beginning Balance [Line 19 of last Report] | | \$81,539.46 | |
| 17. Receipts for Current Reporting Period: | | | |
| a. Contributions received this period [Line 5 of Schedule G] | \$983.40 | | |
| 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 | | \$983.40 | |
| e. Total Expendable Funds [Add Linds 16 and 17d] | | | \$82,522.86 |
| 18. Disbursements for Current Reporting Period | | | |
| a. Expenditures made this reporting period [Line 10 of Schedule G] | \$340.00 | | |
| 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] | | | \$340.00 |
| 19. Ending Balance [Subtract Line 18b from Line 17e] | | | \$82,182.86 |
| 20. Total Unpaid Debts [from Schedule F of this report] | \$0.00 | | |
| Committee's Receipts and Disbursements - Election Cycle | | | |
| 21. Balance at Start of Election Cycle | | \$91,260.24 | |
| 22. Previous Receipts [Line 24 from last report] | \$4,586.20 | | |
| 23. Receipts from Current Reporting Previous [Line 17d above] | \$983.40 | | |
| 24. Total Receipts this Election Cycle [Add lines 22 and 23] | | \$5,569.60 | |
| 25. Total Funds Available [Add lines 21 and 24] | | | \$96,829.84 |
| 26. Previous Disbursements [Line 28 from last report] | \$14,306.98 | | |
| 27. Disbursements from Current Reporting Period [Line 18d above] | \$340.00 | | |
| 28. Total Disbursements this Election Cycle | | | \$14,646.98 |
| 29. Ending Balance | | | \$82,182.86 |