

Essential policy and politics for the profession



January 3, 2020

With the strong growth and engagement of AALU Ambassadors, we've had an outstanding year! We have built new relationships on Capitol Hill, educated hundreds of lawmakers and staff, and advocated successfully on behalf of your business and your clients.

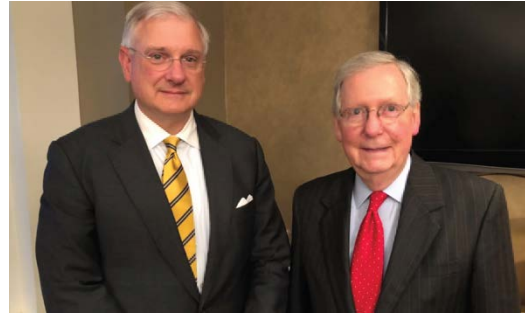
Just this year, we created 55 new relationships between Ambassadors and lawmakers, raised over \$2.3 million in political contributions, held 540 meetings with policymakers, and enrolled a total of 325 Ambassadors.

This has been the most successful year of the AALU Ambassador Program to date and has yielded significant results: from regulatory wins in Transfer for Value and Estate Tax Clawback, to a 20% tax deduction with 199A, and a legislative victory in the retirement space with the SECURE Act. All these accomplishments have helped to lay the groundwork for the next round of tax reform.

We have bigger goals for 2020 – [Click Here to join the program and make a difference!](#)



Bob Eichler (Penn Mutual) with Rep. Tom Suozzi (D-NY) pose on the Speaker's Balcony at the United States Capitol.



David Byers (M Financial) hosts Leader Mitch McConnell (R-KY) in AALU's Washington, D.C., office.



Left to Right: Brad Hubbard (Penn Mutual), Rep. Roger Williams (R-TX), Julie Schneider (Global Atlantic Financial), and Luis Freire (Pan America) meet in the Congressman's office during Capitol Hill Club at TRANSFORM 2019.



Dan Barry (NFP), John Barry (M Financial), Ken Samuelson (NFP), and Charles Stegall (Guardian) host Rep. Patrick McHenry for lunch in Charlotte, NC.



Dave Morris (MassMutual) at breakfast with Senator Ben Cardin (D-MD) in Washington, D.C.



Russell Vandeveld (Northwestern Mutual) hosts a lunch with Rep. Terri Sewell (D-AL) in Birmingham, AL.



Matt Vahue (Guardian) hosts Rep. Tom Reed (R-NY) at his home in New York.



Carl Peterson (M Financial), Senator Susan Collins (R-ME), and Dermot Healey (Crump) together for lunch at AALU's D.C. office.



Bob Birgen (First Financial) and Rep. Jimmy Gomez (D-CA) grab coffee in Los Angeles.



Berkely Arrants (MassMutual) and Harris Fishman (MassMutual) host Senator Pat Toomey (R-PA) for lunch in Philadelphia.



Tom Sellin (Pacific Life) hosts a lunch for Senator Mike Crapo (R-ID) in AALU's Washington office.



Andrea Wass (Northwestern Mutual) hosts Steve Daines (R-MT) at her office in Bozeman, MT.



Rep. Linda Sánchez (D-CA) and Marc Schwartz (NFP) meet back in her district in California.



Marko Djuranovic (M Financial) meets with Rep. Jim Himes (D-CT).



Gregg LaSpisa (AXA), Larry Rybka (Valmark), George Blaha (Northwestern Mutual), and Terry Horan (M Financial) host Senator Rob Portman (R-OH) at the AALU office in Washington, D.C.



Mike James (NFP), Rep. Richard Neal (D-MA), Andrew Lee (MassMutual), and Mike Mingoelli (M Financial) meet during AALU's board meeting in Washington, D.C.



Paul Tokarz (MassMutual) and Peter Hoopis (MassMutual) host Rep. Darin LaHood (R-IL) at the Hoopis Group offices in Chicago.



David Fritz (Northwestern Mutual) and Ron Kind (R-WI) together in AALU's Washington office.

A look at AALU Ambassador Achievements

55 

New Ambassador Relationships



\$2.3

Million in political
contributions

540

Meetings with
lawmakers



325 

Total Ambassadors enrolled in 2019


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A look at 2019 AALU Wins

199A
Tax Break

SECURE
Act

Estate Tax
Clawback

Transfer for
Value

-  The largest tax relief in history for financial security professionals and their clients.
-  Broadening retirement savings and planning opportunities for savers and advisors.
-  Preserving gifting opportunities in estate planning, without the threat of clawbacks.
-  Preserving the current tax treatment for business uses of life insurance in M&A activity.


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If you're an AALU Ambassador – we sincerely thank you for the work you've put in this year to elevate the profession to new heights. If you know an AALU Ambassador, please thank them for the work they do on behalf of your business and clients. If you don't know an AALU Ambassador, find a list of names [here](#). If you'd like to become an Ambassador or learn more, reach out to Josh Caron at caron@aalu.org.

Mark your calendars!

Vote to establish our new organization representing the financial security profession starting **January 19!**



AALU  GAMA 

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We've updated our login process! If you haven't done so already, click [here](#) to reset your password by selecting *Forgot password*.

Questions?

Contact support@aalu.org

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