FOIA Marker

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Records Management, White House Office of

Subject Files - FG006-27 (Office of Senior Advisor - Karl Rove)

Stack:	Row:	Sect.:	Shelf:	Pos.:	FRC ID:	Location or Hollinger ID:	NARA Number:	OA Number:
W	11	4	1	2	9707	22570	10789	10731

Folder Title:

508641 [1] - [2]

Withdrawn/Redacted Material
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DOCUMENT NO.	FORM	SUBJECT/TITLE	PAGES	DATE	RESTRICTION(S)
001	Note	[Note] - To: Matt Schlapp - From: SR	1	N.D.	P5;
002	Resume	[Resume]	1	N.D.	P2; P5; P6/b6;
003	Memorandum	Investor Confidence [with attachments] - To: Stephen Friedman, et al. - From: Mitch Daniels	4	02/27/2003	P5;
004	Email	Changing Gears... - To: Karl Rove	1	02/27/2003	P2; P5; P6/b6;
005	Memorandum	Invitation for Karl to Attend the National Mining Association's... - To: Susan Ralston - From: Ken Mehlman	1	02/27/2003	P5; P6/b6;
006	Email	Here's Where We Are on Statement for Tomorrow - To: Karl Rove, et al. - From: Phil Cooney	1	02/26/2003	P5;

COLLECTION TITLE:
Records Management, White House Office of
SERIES:
Subject Files - FG006-27 (Office of Senior Advisor - Karl Rove)
FOLDER TITLE:
508641 [1]
FRC ID:
9707

RESTRICTION CODES

Presidential Records Act - [44 U.S.C. 2204(a)]

P1 National Security Classified Information [(a)(1) of the PRA]
P2 Relating to the appointment to Federal office [(a)(2) of the PRA]
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PRM. Personal record misfile defined in accordance with 44 U.S.C. 2201(3).

Deed of Gift Restrictions

A. Closed by Executive Order 13526 governing access to national security information.
B. Closed by statute or by the agency which originated the document.
C. Closed in accordance with restrictions contained in donor's deed of gift.

Freedom of Information Act - [5 U.S.C. 552(b)]

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Records Not Subject to FOIA

Court Sealed - The document is withheld under a court seal and is not subject to the Freedom of Information Act.

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DOCUMENT NO.	FORM	SUBJECT/TITLE	PAGES	DATE	RESTRICTION(S)
007	Email	FW: My Note to Rush re: Rather - To: Susan Ralston - From: Karl Rove	2	02/28/2003	PRM;
008	Letter	[Thanks] - To: Karl Rove - From: Don Eberly	1	02/12/2003	PRM;
009	Memorandum	The Emergency Steel Loan Guarantee Board... - To: Karl Rove, et al. - From: Coddy Johnson	3	03/04/2003	P5;
010	Email	Re: Two Revised Documents for Tomorrow's... [with attachments] - To: Charles Blahous - From: Charles Blahous	4	03/03/2003	P5;
011	Memorandum	Suggestions RE: FCC [with attachment] - To: Joshua Bolten, et al. - From: Karl Rove	2	03/04/2003	P5;
012	Email	Fw: - To: Susan Ralston - From: Karl Rove	1	03/02/2003	PRM;

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DOCUMENT NO.	FORM	SUBJECT/TITLE	PAGES	DATE	RESTRICTION(S)
013	Letter	[Book] - To: Karl Rove - From: William Shawcross	1	02/27/2003	P6/b6;

COLLECTION TITLE:
Records Management, White House Office of

SERIES:
Subject Files - FG006-27 (Office of Senior Advisor - Karl Rove)

FOLDER TITLE:
508641 [1]

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THE WHITE HOUSE

WASHINGTON

Date: 2/20

To: Tim Goeglein

From: Strategic Initiatives

X FYI

___ Appropriate Action

___ Direct Response

___ Prepare Response For My Signature

___ Per Our Conversation

___ Let's Discuss

___ Per Your Request

___ Please Return

___ Deadline

___ Other

Comments: ______________________________

508641

THE WHITE HOUSE

WASHINGTON

Date: 2/20

To: ~~Ruben Barrales~~

From: Strategic Initiatives /Carl

X FYI

___ Appropriate Action

___ Direct Response

___ Prepare Response For My Signature

___ Per Our Conversation

___ Let's Discuss

___ Per Your Request

___ Please Return

___ Deadline

___ Other

Comments: ______________________________

Ruben Barrales
Tim Goeglein
- FYI

ATR
AMERICANS FOR TAX REFORM

FAX TRANSMITTAL

1920 L STREET, N.W. - SUITE 200 - WASHINGTON, DC 20036 - 202-785-0266 - HTTP://WWW.ATR.ORG

TO: Karl Rove

FAX: 456-0191

FROM: Karen Bailey

Americans for Tax Reform
1920 L Street, NW Suite 200
Washington, DC 20036
(202) 785-0266
(202) 785-0261 (fax)

DATE: February 27, 2003

PAGES (Including Cover): 6

Comments: Mr. Rove,
Grover asked me to send you the latest update on the state legislative advisory project (resolutions). I have also attached the resolution we have sent to the states with regard to Miguel Estrada as well as an update on which chambers are introducing this particular resolution.
Take care,
Karen

A Resolution Requesting the United States Senators of the State of ______________ Support the Floor Vote and Nomination of Judicial Nominee Miguel Estrada

WHEREAS, on May 9, 2001, President Bush nominated Miguel A. Estrada to fill a vacancy on the United States Court of Appeals for the District of Columbia Circuit; and

WHEREAS, Mr. Estrada's credentials go uncontested beginning with his mastery of the English language and American culture upon his arrival to the United States as an immigrant from Honduras, his graduation *magna cum laude* from Columbia University and Harvard Law School; and

WHEREAS, over a year-and-a-half has passed without a vote on the Senate floor; and

WHEREAS, the Senate Judiciary committee has issued a favorable report to the United States Senate yet because of partisan politics Democratic Senators threaten to filibuster a Senate Floor vote; and

WHEREAS, Mr. Estrada has received support from liberal and conservative colleagues alike who attest that he is one of the most brilliant and effective appellate lawyers in the country; and

WHEREAS, organizations who support Mr. Estrada include the League of United Latin American Citizens; U.S. Hispanic Chamber of Commerce; Hispanic National Bar Association; Hispanic Business Roundtable; and The Latino Coalition;

WHEREAS, Mr. Estrada would be the first Hispanic in the country to sit on the U.S. Court of Appeals District of Columbia Circuit – an important and prestigious position within the nation's Court of Appeals; be it therefore

RESOLVED, that the Legislature of the State of ________________ requests our United States Senators in the United States Congress work to allow a vote on the floor of the United States Senate on the appointment of Miguel Estrada.

ESTRADA RESOLUTION OVERVIEW

As of 27-Feb-03

*** Indicates the resolution has passed**

Underline Indicates resolution has been introduced

Roman indicates commitment to have resolution introduced

Arkansas: Resolution will be introduced in the House week of March 3; also Republican Caucus sending letter to US Senators

California: Will be introduced in both Senate and House

Florida: House will most likely introduce

Illinois: House will introduce (currently being drafted)

New Mexico: House will introduce

New Jersey: Introduced in the House

Nevada: House will introduce

New York: Proclamation by Senate President has been promised

South Carolina: House will introduce, Senate most likely will introduce

South Dakota: House will most likely introduce

Washington: Has already been introduced in the House

Numbers Overview:

3 Chambers Have Introduced

10 Chambers Intending to Introduce

0 Passed

Legislative Advisory Project Brief Overview

As of 27-Feb-03

*** Indicates the resolution has passed**

Underline Indicates resolution has been introduced

Roman indicates commitment to have resolution introduced

Tort Reform

- Arkansas (H)
- California (S)
- California (H)
- **Colorado (S)***
- Colorado (H) – Joint Resolution
- Florida (H)
- Georgia (S)
- Idaho (S)
- Idaho (H)
- Illinois (H)
- Iowa (S)
- Iowa (H)
- Kansas (H)
- Maryland (S)
- Maryland (H) – Joint Resolution
- Minnesota (H)
- Minnesota (S)
- New Mexico (H)
- New Mexico (S) - Joint Resolution
- Oregon (H)
- Pennsylvania (H)
- South Carolina (H)
- Wisconsin (S)

Permanently Repealing the Death Tax

- Alaska (H)
- Alaska (S) – Joint Resolution
- Arkansas (H)
- Arkansas (S) – Concurrent Resolution
- California (S)
- California (H)
- **Colorado (S)***
- Colorado (H) – Joint Resolution
- Florida (H)
- Florida (S)
- **Idaho (S)***
- Idaho(H) - Joint Memorial
- Illinois (H)
- Iowa (S)
- Iowa (H)
- Kansas (H)
- **Kentucky (S)***
- Maryland (S)
- Maryland (H) – Joint Resolution
- Michigan (H)
- Minnesota (S)
- New Mexico (H)
- New Mexico (S) – Joint Resolution
- North Carolina (S)
- **North Dakota (H)***
- North Dakota (S) - Concurrent Resolution
- Oregon (H)
- Pennsylvania (H)
- **South Carolina (H)***
- South Carolina (S) – Concurrent Resolution
- Texas (H) ?
- **Utah (H)***
- **Utah (S) - Joint Resolution***
- Washington (S)
- Washington (H) – Joint Resolution
- Wisconsin (S)

Abolishing the Alternative Minimum Tax

- Arkansas (H)
- California (S)
- California (H)
- Colorado (S)
- Colorado (H)
- Florida (H)
- Hawaii (S)
- Idaho (S)
- Idaho (H) - Joint Memorial
- Illinois (H)
- Iowa (S)
- Iowa (H)
- Kansas (H)
- Michigan (H)
- Minnesota (S)
- New Jersey (H)
- New Mexico (H)
- New Mexico (S) – Joint Resolution
- Oregon (H)
- Pennsylvania (H)
- **South Carolina (H)***
- South Carolina (S)
- Texas (H)?
- **Utah (H)***
- Utah (S) – Joint Resolution
- Washington (H)
- Washington (S) – Joint Resolution
- Wisconsin (S)

Making the 2001 Savings Provisions Permanent

- Arkansas (H)
- California (S)
- California (H)
- Colorado (S)
- Colorado (H)
- Florida (H)
- Hawaii (S)
- Idaho (S)
- Idaho (H)
- Illinois (H)
- Iowa (S)
- Iowa (H)
- Kansas (H)
- Michigan (H)
- **New Mexico (H)***
- New Mexico (S) – Joint Resolution
- Oregon (H)
- Pennsylvania (H)
- **South Carolina (H)***

- South Carolina (S) – Concurrent Resolution
- Texas (H) ?
- Wisconsin (S)

Supporting the President's 2003 Economic Growth and Tax Relief Package
- Arkansas (H)
- California (S)
- California (H)
- Colorado (S)
- Colorado (H)
- Florida (H)
- Hawaii (S)
- Idaho (S)
- Idaho (H)
- Illinois (H)
- Iowa (S)
- Iowa (H)
- Kansas (H)
- Michigan (H)
- Minnesota (S)
- New Mexico (H)
- New Mexico (S) – Joint Resolution
- **North Dakota (H)***
- North Dakota (S) - Concurrent Resolution
- Oregon (H)
- Pennsylvania (H)
- South Carolina (H)
- Washington (S)
- Washington (H) – Joint Resolution
- Wisconsin (S)
- Wisconsin (H) - Joint Resolution

Passing the Defense Appropriations Bill First
- **Arkansas (H)***
- California (S)
- **Colorado (S)***
- Colorado (H) – Joint Resolution
- Florida (H)
- Hawaii (S)
- Illinois (H)
- Iowa (S)
- Iowa (H)
- Kansas (H)
- **Kentucky (S)***
- New Mexico (H)
- New Mexico (S) – Joint Resolution
- Oregon (H)
- Pennsylvania (H)
- **South Carolina (H)***
- South Carolina (S) – Concurrent Resolution
- Wisconsin (S)

Supporting a National Missile Defense System
- Alaska (H)
- Alaska (S) – Joint Resolution
- Arizona (H)
- Arizona (S) – Concurrent Resolution
- Arkansas (H)
- California (S)
- **Colorado (S)***
- Colorado (H) – Joint Resolution
- Florida (H)
- Hawaii (S)
- Illinois (H)
- Iowa (S)
- Iowa (H)
- Kansas (H)
- Minnesota (H)
- Minnesota (S)
- New Mexico (H)
- New Mexico (S) – Joint Resolution
- Oregon (H)
- Pennsylvania (H)
- **South Carolina (H)***
- South Carolina (S) – Concurrent Resolution
- Texas (H) ?
- **Utah (H)***
- **Utah (S) – Joint Resolution***
- **Virginia (H)***
- Wisconsin (S)

Supporting the President on His Decision with Regard to Iraq
- Arkansas (H)
- California (S)
- California (H)
- **Colorado (S)***
- Colorado (H) – Joint Resolution
- Florida (H)
- **Georgia (H)***
- Hawaii (S)
- **Hawaii (H)***
- Idaho (S) – Concurrent Resolution
- Idaho (H)
- Illinois (H)
- **Iowa (S)***
- Iowa (H)
- Kansas (H)
- **Kentucky (H)*** - Commends the troops
- **Kentucky (S)*** - Commends the troops
- New Mexico (H)
- New Mexico (S) – Joint Resolution
- **Oklahoma (H)***
- Oklahoma (S) - Concurrent Resolution
- Oregon (H)
- Pennsylvania (H)
- **South Carolina (H)***
- **South Carolina (S)* – Concurrent Resolution**
- Wisconsin (S)

Overview of the Numbers (# of Chambers)

Tort Reform:
1 Passed, 7 Introduced, 15 Committed to Introduce
Death Tax:
7 Passed, 12 Introduced, 17 Committed to Introduce
Alternative Minimum Tax:
2 Passed, 7 Introduced, 19 Committed to Introduce
Savings Provisions:
2 Passed, 5 Introduced, 15 Committed to Introduce
President's Economic Package:
1 Passed, 6 Introduced, 19 Committed to Introduce
Pass Defense App. First:
4 Passed, 2 Introduced, 14 Committed
National Missile Defense System:
5 Passed, 8 Introduced, 14 Committed
Iraq Resolution:
9 Passed, 5 Introduced, 12 Committed

THE WHITE HOUSE

WASHINGTON

508641

Date: 2/28

To: ~~Matthew Schlapp~~

From: Strategic Initiatives Susan

X FYI

X Appropriate Action

_____ Direct Response

_____ Prepare Response For My Signature

_____ Per Our Conversation

_____ Let's Discuss

_____ Per Your Request

_____ Please Return

_____ Deadline

_____ Other

Comments: _____

Withdrawal Marker
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Note	[Note] - To: Matt Schlapp - From: SR	1	N.D.	P5;

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2015-0037-F

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THE WHITE HOUSE
WASHINGTON

508641

Date: 2/20

To: ~~JAY Lefkowitz~~

From: Strategic Initiatives |Carl Rove

X FYI

_____ Appropriate Action

_____ Direct Response

_____ Prepare Response For My Signature

_____ Per Our Conversation

_____ Let's Discuss

_____ Per Your Request

_____ Please Return

_____ Deadline

_____ Other

Comments:

Jay Lefkowitz - FYI

USA wrestling

6155 Lehman Drive•Colorado Springs, CO•80918 (719) 598-8181 (719) 598-9440 www.usawrestling.org

FaxCoverSheet

TO Karl Rove	FROM Rich Bender
COMPANY Senior Adviser to President	DATE 2/27/03
FAX NUMBER	PHONE NUMBER

Total Pages, including cover: 2

☐ Urgent ☐ Reply ASAP ☐ Please Comment ☐ Please Review ☐ For Your Information

COMMENTS

Celebrating 30 Years of Leadership

USA wrestling

6155 Lehman Drive • Colorado Springs, Colorado 80918
Telephone: (719) 598-8181 • Fax: (719) 598-9440 • Cable: USA WRESTLE

February 27, 2003

Rod Paige
Secretary of Education
400 Maryland Ave. SW
Washington, DC 20202

Dear Secretary Paige:

This morning, I read some very disturbing news in regards to a reported position from you and the Department of Education concerning Title IX.

The stories indicated that you only plan to consider the recommendations presented to you by the Commission on Opportunities in Athletics that were unanimously approved.

If this is true, that is a poor position to take. That decision would eliminate all of the hard work and efforts of the Commissioners and all of those involved in the process. Not only does it not make any sense, but it also allows continued discrimination in the current Title IX enforcement rules.

Think about it. What if a bill goes through Congress and is passed, but does not receive unanimous support? Is it still a law? What if the Supreme Court votes on a case, but does not receive the votes of every Justice? Is is still a legal precedent? Of course they are!!!

It is impossible to expect that you will get complete agreement on every aspect of Title IX, considering the complexity of the law and the variety of viewpoints on the issue. Certainly, there were many recommendations passed by the Commission that were not unanimous that offer valuable ideas and approaches to providing a fair system of enforcement.

It is especially impossible to get agreement on substantive proposals when you named two biased individuals to the Commission who are advocates of radical special interest groups. Julie Foudy is the current president of the Women's Sports Foundation, the most vocal sports quota advocate organization. Donna De Varona was a founder of the Women's Sports Foundation. Foudy and De Varona have been obstructionists in the Commission process all the way through. There is no doubt that they had their minds made up even before the first meeting, before any of the testimony was heard, before any of the open debates. The fact that they would not sign off on the final report tells you that they have no interest in seeing any changes to Title IX enforcement, regardless if they have merit.

By only reviewing the unanimous proposals from the Commission, you are giving Foudy and De Varona veto power over the entire 15-member panel. This position would in effect throw away all the hard work and effort of the Commissioners, as well as waste all the taxpayers dollars spent on the Commission process.

The United States is based upon a majority rules principle. Requiring unanimous consent is not only unrealistic, but it is un-American.

Sincerely,

Rich Bender
Executive Director

cc: George W. Bush, President
Gerald Reynolds, Assistant Secretary of Education for Civil Rights
Karl Rove, Senior Advisor to the President
J. Dennis Hastert, Speaker of the House of Representatives

THE WHITE HOUSE 5086411

WASHINGTON

Date: 2/28/03

To: ~~Lezlee Westine~~

From: Strategic Initiatives Susan Ralston

✓ FYI

___ Appropriate Action

___ Direct Response

___ Prepare Response For My Signature

___ Per Our Conversation

___ Let's Discuss

___ Per Your Request

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___ Deadline

___ Other

Comments: ___

Lezlee - fyi

The City of New York

COMMISSION ON HUMAN RIGHTS
40 RECTOR STREET, NEW YORK, NY 10006
Telephone: (212) 306-7560 TDD: (212) 306-7686
Fax: (212) 306-7658 www.nyc.gov

PATRICIA L. GATLING
Commissioner and Chair

OFFICE OF THE PRESIDENT
STRATEGIC INITIATIVES
2003 FEB 26 AM 9:26

February 12, 2003

Honorable Karl Rove
Senior Advisor to the President
The White House
1600 Pennsylvania Avenue
Washington, D.C. 20500

Dear Mr. Rove:

As the Deputy Commissioner of the New York City Human Rights Commission, I needed some help regarding a particular issue affecting our City's Muslim community. I contacted Mr. Ali Tulbah for some help regarding this matter. Mr. Tulbah took the time to speak with me and offered his assistance. He even went so far as to give me his cellular telephone number in case I needed any further help.

It is very gratifying to know that our President has such wonderful, hard working and thoughtful staff members like Mr. Tulbah.

Sincerely,

Avery S. Mehlman
Deputy Commissioner
Human Rights Commission

Protecting and Promoting Human Rights Since 1955

THE WHITE HOUSE 508641

WASHINGTON

Date: 2/20

To: ~~Ken, Matt, Pete, Lauren~~ JVL, ~~Fred's~~ Ravi

From: **Strategic Initiatives**

X FYI

___ Appropriate Action

___ Direct Response

___ Prepare Response For My Signature

___ Per Our Conversation

___ Let's Discuss

___ Per Your Request

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FORM	SUBJECT/TITLE	PAGES	DATE	RESTRICTION(S)
Memorandum	Investor Confidence [with attachments] - To: Stephen Friedman, et al. - From: Mitch Daniels	4	02/27/2003	P5;

This marker identifies the original location of the withdrawn item listed above. For a complete list of items withdrawn from this folder, see the Withdrawal/Redaction Sheet at the front of the folder.

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Records Management, White House Office of

SERIES:
Subject Files - FG006-27 (Office of Senior Advisor - Karl Rove)

FOLDER TITLE:
508641 [1]

FRC ID:
9707

OA Num.:
10731

NARA Num.:
10789

FOIA IDs and Segments:

2015-0037-F

RESTRICTION CODES

Presidential Records Act - [44 U.S.C. 2204(a)]

P1 National Security Classified Information [(a)(1) of the PRA]
P2 Relating to the appointment to Federal office [(a)(2) of the PRA]
P3 Release would violate a Federal statute [(a)(3) of the PRA]
P4 Release would disclose trade secrets or confidential commercial or financial information [(a)(4) of the PRA]
P5 Release would disclose confidential advise between the President and his advisors, or between such advisors [a)(5) of the PRA]
P6 Release would constitute a clearly unwarranted invasion of personal privacy [(a)(6) of the PRA]

PRM. Personal record misfile defined in accordance with 44 U.S.C. 2201(3).

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b(8) Release would disclose information concerning the regulation of financial institutions [(b)(8) of the FOIA]
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THE WHITE HOUSE
WASHINGTON

508641

Date: 2/20

To: ~~Ken~~ ~~Matt~~ ~~Jack~~ Karl

From: Strategic Initiatives

X FYI
___ Appropriate Action
___ Direct Response
___ Prepare Response For My Signature
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Comments: ______________________

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FORM	SUBJECT/TITLE	PAGES	DATE	RESTRICTION(S)
Email	Changing Gears... - To: Karl Rove	1	02/27/2003	P2; P5; P6/b6;

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FRC ID:
9707
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10731
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THE WHITE HOUSE

WASHINGTON

Date: 2/27

To: Steve Friedman

From: **Strategic Initiatives** Karl Rove

X FYI

___ Appropriate Action

___ Direct Response

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___ Per Our Conversation

___ Let's Discuss

___ Per Your Request

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___ Deadline

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Comments: ______________________

THE WHITE HOUSE

WASHINGTON

Date: 2/27

To: Keith Hennessey

From: **Strategic Initiatives** Karl Rove

X FYI

___ Appropriate Action

___ Direct Response

___ Prepare Response For My Signature

___ Per Our Conversation

___ Let's Discuss

___ Per Your Request

___ Please Return

___ Deadline

___ Other

Comments: ______________________

THE WHITE HOUSE

WASHINGTON

Date: 2/27

To: Adam Goldman

From: **Strategic Initiatives** Karl

X FYI

___ Appropriate Action

___ Direct Response

___ Prepare Response For My Signature

___ Per Our Conversation

___ Let's Discuss

___ Per Your Request

___ Please Return

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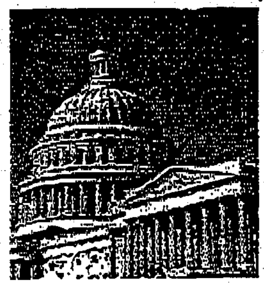
Comments: ______________________

Steve Friedman
Keith Hennessey
Adam Goldman
FYI



FAX COVER SHEET

The Honorable George V. Voinovich
United States Senator
State of Ohio
317 Hart Senate Office Building
Washington, DC 20510-3504

PHONE: (202) 224-3353 FAX: (202) 228-0497

TO: Karl Rove

FROM:
X Senator George V. Voinovich
Ted Hollingsworth, Chief of Staff
Aric Newhouse, Legislative Director
Angie Youngen, Assistant to the Chief of Staff
X Melanie Worth, Scheduler
Matt Cronin, Personal Assistant

FAX #: 456-0191

DATE: 2-26-03

Number of Pages Including Cover Sheet: 2

COMMENTS:

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February 14, 2003

Senator George Voinovich
Hart Senate Office, Room 317
Washington, D.C. 20510

Dear George,

As I look at the administrations tax proposal, I have difficulty understanding the merits of eliminating the tax on dividends. I do understand double taxation and someday it probably should be eliminated, but not now. This elimination will not achieve the boost intended for our economy and also, it is not what our clients and your constituency wants.

We have over 2000 clients in the firm and in discussion with other partners; we are finding that almost without exception, this elimination of the tax on dividends does little. Our clients are looking for faster depreciation rates, investment tax credits, and lower tax rates. Essentially, the items which will increase their cash flow. This in turn prompts the businesses to buy more capital equipment and do more hiring.

In addition, the clients have pension plans, 401(k)'s and other types of tax deferred vehicles which shelter current taxation on dividends. Our clients are privately owned and as such are not interested in the stock value. The stock is not for sale. Most of these businesses plow back their profits into their companies.

Contrary to the administrations position, there is no assurance that publicly-held companies currently paying small dividends would increase its dividends so as to increase the value of its stock.

If "small business" is touted by all administrations and members of congress as being the backbone of our country, then this proposal does little for them. I have been an advocate of small business for thirty (30) years and I believe they represent the mainstream of our country. They generally do not have the ability or inclination to outsource business outside of the United States which larger publicly held companies do in order to obtain the rate of return needed to satisfy the investment bankers, analysts, etc. Politically speaking, I do not see positive votes in such a proposal.

Cordially,

Vince

Vincent M. Panichi

P:\PARTNER\vmp\2003\Sen Voinovich.DOC

THE WHITE HOUSE
WASHINGTON

508641

Date: 2/28/03

To: Steve Friedman, Adam Goldman

From: Strategic Initiatives Karl

✓ FYI

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Friedman/Goldman

by Walter Updegrave

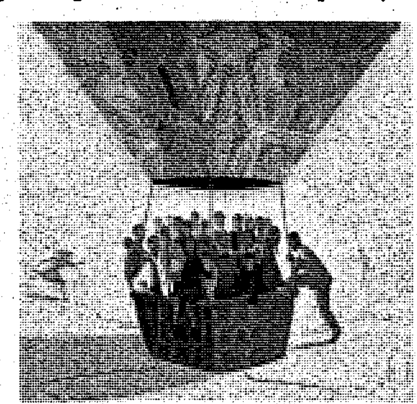
Dividend Mania

What the Bush dividend plan would *really* mean for you.

By the late 1990s, the concept of companies paying shareholders a regular return in cash had become almost an anachronism, a throwback to the days when investors followed the market on ticker-tape machines. But that changed in January, when the Bush administration proposed eliminating the double taxation of dividends, thus allowing companies to pay certain dividends tax-free to shareholders. Suddenly, dividends were back, and within hours pundits were unleashing lists of high-yield stocks that were quickly followed by yet more lists of cash-rich companies that might pay dividends in the future. The message to investors was clear: If you want superior returns, dividend stocks are the way to go.

Not so fast. While this newfound enthusiasm for dividends is understandable, I wouldn't be too quick to join the rush into dividend-paying shares. For one thing, this proposal still has to wend its way through Congress, where it could be twisted and turned or, for that matter, scuttled. (For more on all aspects of the Bush tax plan, see the article on page 76.) But even if the proposal does pass in something similar to its current form, I believe its effects will be more far-reaching than investors realize. This plan is not just about dividends—and capitalizing on it will involve more than merely snapping up dividend-paying stocks or funds.

The real impact of the Bush plan, as I see it, is that it will make companies more accountable for how they use shareholders' money—and it will require us to be more rigorous about choosing our investments. But to understand why this is the case, you've got to understand how the President's proposal would actually work.



Mick Wiggins

Don't be too quick to join the rush into dividend-paying stocks.

Dividend details. When the proposal was first unveiled, many people assumed that shareholders would sidestep taxes on all dividends. But it soon became clear that things would be more complicated. (Hey, we're talking taxes, what did you expect?) In fact, to qualify for tax-free status, a dividend must be what the Treasury Department calls an excludable dividend, which means it must be paid from earnings on which the company has already paid tax. So, for example, if you own stock in a company that earns $10 a share before taxes and has a tax bill of $3.50 a share, the company could pay as much as $6.50 a share in excludable, or tax-free, dividends to you. (Mutual funds would pass along to shareholders the excludable dividends they collect from the firms they own.)

As a practical matter, the amount companies could pay in tax-free dividends in a given year would be based on earnings from previous years. As Treasury officials envisioned the plan in the third week of January, for example, excludable dividends paid this year would be based on profits in 2001, those paid in 2004 would be based on profits in 2002, and so on. This would give firms ample time to file their taxes and calculate exactly how much they can distribute.

There are other wrinkles to keep in mind. First, some dividends, such as those typically paid by real estate investment trusts (REITs) and most preferred securities, are not taxed at the corporate level, which means you would still have to pay tax on them. That makes sense, since the aim of this proposal is to have dividend income taxed once, not to exempt it from taxes altogether. (For other dividends that would be taxable, see the box below.)

One other thing: If you're hoping to profit on this proposal by investing in companies with lots of cash in hopes that they'll pay out their cash hoard in tax-free dividends down the road, think again. Take Microsoft. Even if the company wanted to, it would not be able to distribute as tax-free dividends all of the $22 billion or so it has retained from earnings in past years. The reason? The Feds aren't sure that all of the retained earnings on any company's balance sheet have already been taxed at the corporate level.

Deem list. If the proposal stopped there, I could send you off on a search for profitable companies with a good record of paying dividends. But there's another important provision that allows companies that don't pay dividends to deliver a tax-free return.

Let's go back to our company with $6.50 a share available for excludable dividends. Instead of paying you a cash dividend, the company could elect to hold on to those after-tax earnings. In that case, you would get a "deemed dividend." You wouldn't receive cash, but you would be able to add $6.50 a share to your cost basis in the stock. So if you paid $90 a share for the stock, received a deemed dividend of $6.50 a share and then sold the stock for $96.50, you would add $6.50 a share to your cost. That erases your taxable gain, putting you in the same position as if you had gotten the tax-free dividend.

Deemed dividends would also give companies some wiggle room for making tax-free payments in years they don't earn money. Say you got deemed dividends from a company. If it had no after-tax earnings in a subsequent year, the company could effectively distribute all or some of previous years' deemed dividends to shareholders in cash, tax-free. Of course, shareholders would then have to lower their cost basis in the stock by the amount of the cash payment, reversing the earlier tax benefit of the deemed dividend. Otherwise, they would be getting two tax breaks on the same dividend.

Profits matter. The deemed-dividend provision has important ramifications. It means that this plan does not favor only companies that pay dividends. It can benefit almost any company that is consistently profitable and pays taxes. On the other hand, companies that shield much of their income through various tax deductions will have less to pass along in tax-free or deemed dividends. This doesn't mean such companies can't be compelling buys. After all, the money a firm saves in taxes will remain in the company, boosting the stock's value. But since those untaxed dollars can't be doled out in tax-free or deemed dividends, the company's prospects for future share-price appreciation would have to be excellent to attract shareholders.

Taxable dividends

The following dividends would still be taxable for shareholders under the Bush tax plan.

Dividends paid by companies from income that hasn't been taxed
Mutual fund dividends that are distributions of interest income or short-term capital gains
Dividend payments from most preferred securities[1]
Dividends from real estate investment trusts (REITs)
Most dividends paid by foreign companies[2]
Dividends in tax-deferred accounts (when withdrawn)

Notes: [1]Payouts from the minority of preferred securities whose dividends have been taxed at the corporate level would be tax-free. [2]A portion of foreign dividends could be tax-free if the firm paid U.S. income taxes.

The companies that stand to be hardest hit are the very ones that thrived in the last bull market—speculative firms that make very little or no money now but say they will down the road. Considering how recent IPOs without profits fared in the bear market, I expect investors to be less apt to forgo tax-free returns today for far iffier returns in the future. This could make it more difficult for fledgling companies to go public, but hey, that's the way the system is supposed to work. We got things backward in the '90s.

Sorting it out. So what does all this mean for investors? One plus is that ending double taxation of dividends should help force companies to be more responsible with shareholders' money. With dividends taxable to shareholders, companies have found it easy to rationalize holding on to earnings rather than returning the money to investors. That's led to a number of abuses, ranging from foolhardy expansion plans based on vague notions of synergy to stock buybacks that seemed intended more to boost the value of execs' stock-option packages than to help long-term shareholders. But if dividends can be paid tax-free, I think companies will have to make a better case to shareholders that any money not paid in dividends will be invested wisely and not squandered.

Equally important, I think this plan would force us to be more disciplined about our investment choices. Want tax-free income? Then you'd better focus on companies that can generate real earnings now or very soon, rather than those with a nebulous possibility of future profits. And are you better off with a company that pays most of its earnings in cash or with one that offers deemed dividends? Cash is nice, but unless you're spending it, you must reinvest it. You can opt for companies that keep the earnings and deem dividends, but if you do that, you're essentially letting the company invest your dividend and betting it will earn a higher return than you could in another investment. It's good for investors to weigh such issues.

No one knows, of course, how this plan would ultimately affect the prices and returns of different types of assets. But one thing I think is clear is that investors can't expect to come out ahead simply by packing their portfolios with stocks and funds that pay tax-free dividends. Sure, I believe that shares of profitable companies that pay cash dividends would benefit as investors began flocking to them. But that surge in demand would bid up the price of these stocks, thus pushing down their dividend yields and future return potential. Meanwhile, the prices of the stocks that investors are fleeing would decline, raising their future return potential. The market isn't a static place. The advantage dividend-paying stocks might have over other types of stocks at any one time will narrow or widen as money moves around. We can't assume that any one type of investment, whatever its tax treatment, is automatically the best deal. We'll have to figure out which alternative looks best at the moment based on its price, the future payouts we'll likely receive and, of course, the risk involved.

But as I said earlier, this is a proposal, not a law. So it would be foolish to make any changes to your investing strategy at this point. If nothing else, however, I believe this proposal is a good starting point for all investors to begin thinking more about how companies ought to deliver returns to their shareholders—and how we ought to decide which companies deserve our investment dollars.

Senior editor Walter Updegrave is the author of Investing for the Financially Challenged *(Warner Books). You can reach him at* **investing101@moneymail.com.**

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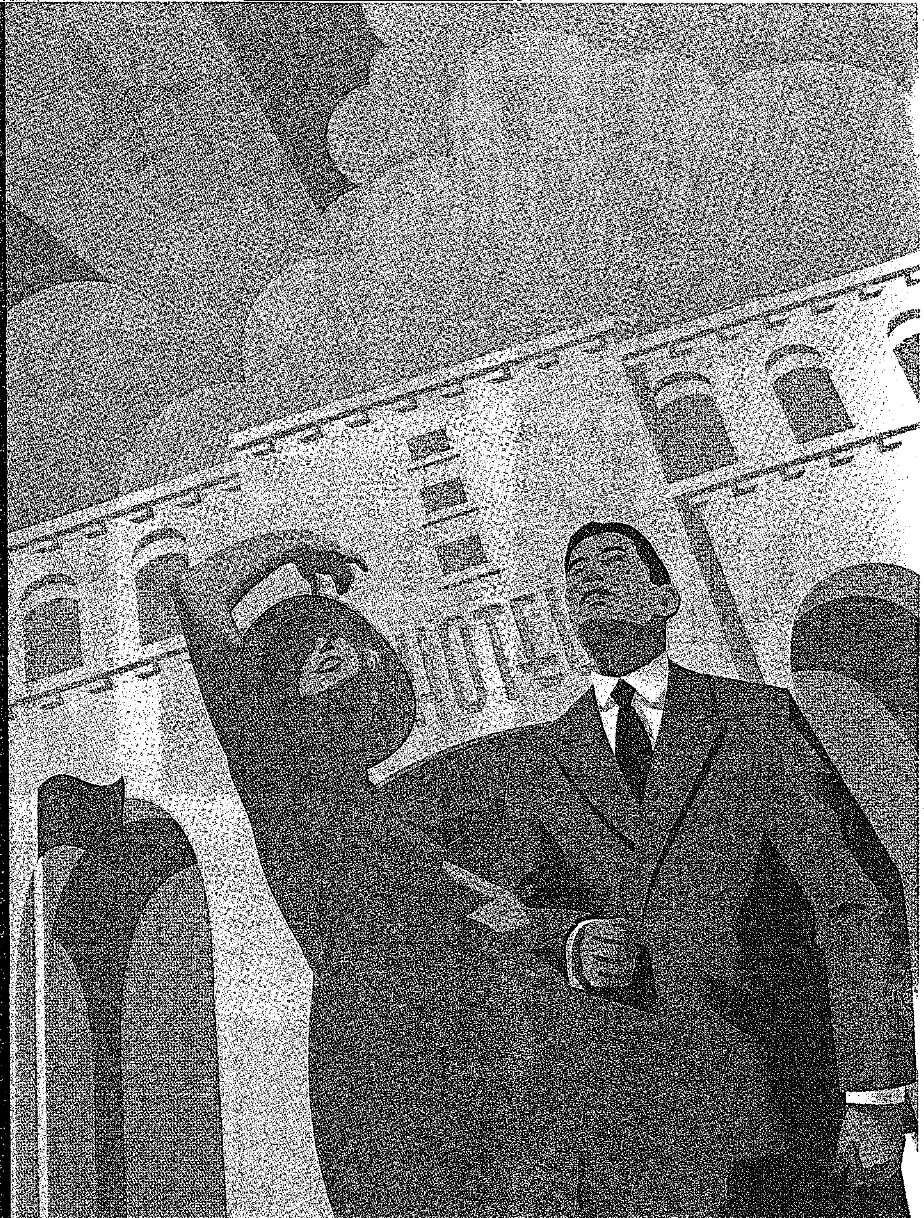

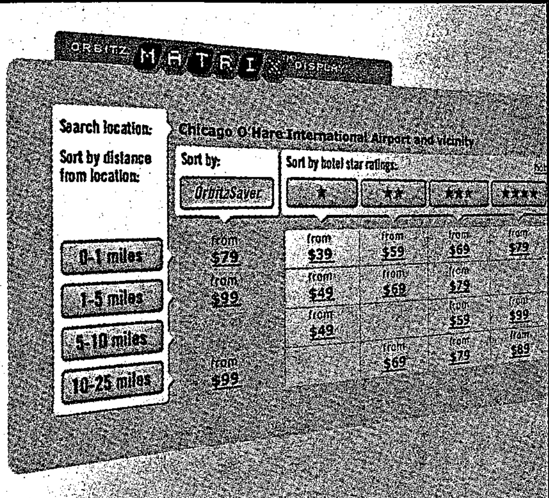

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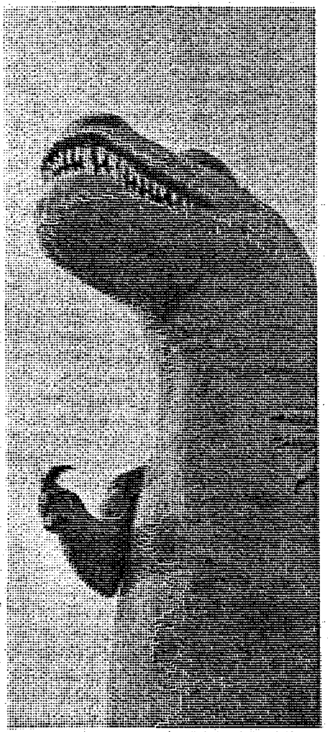

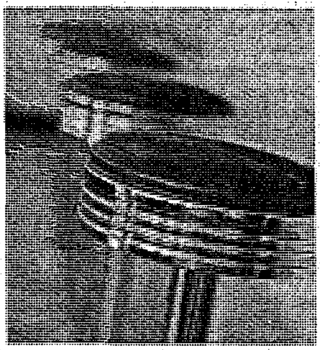

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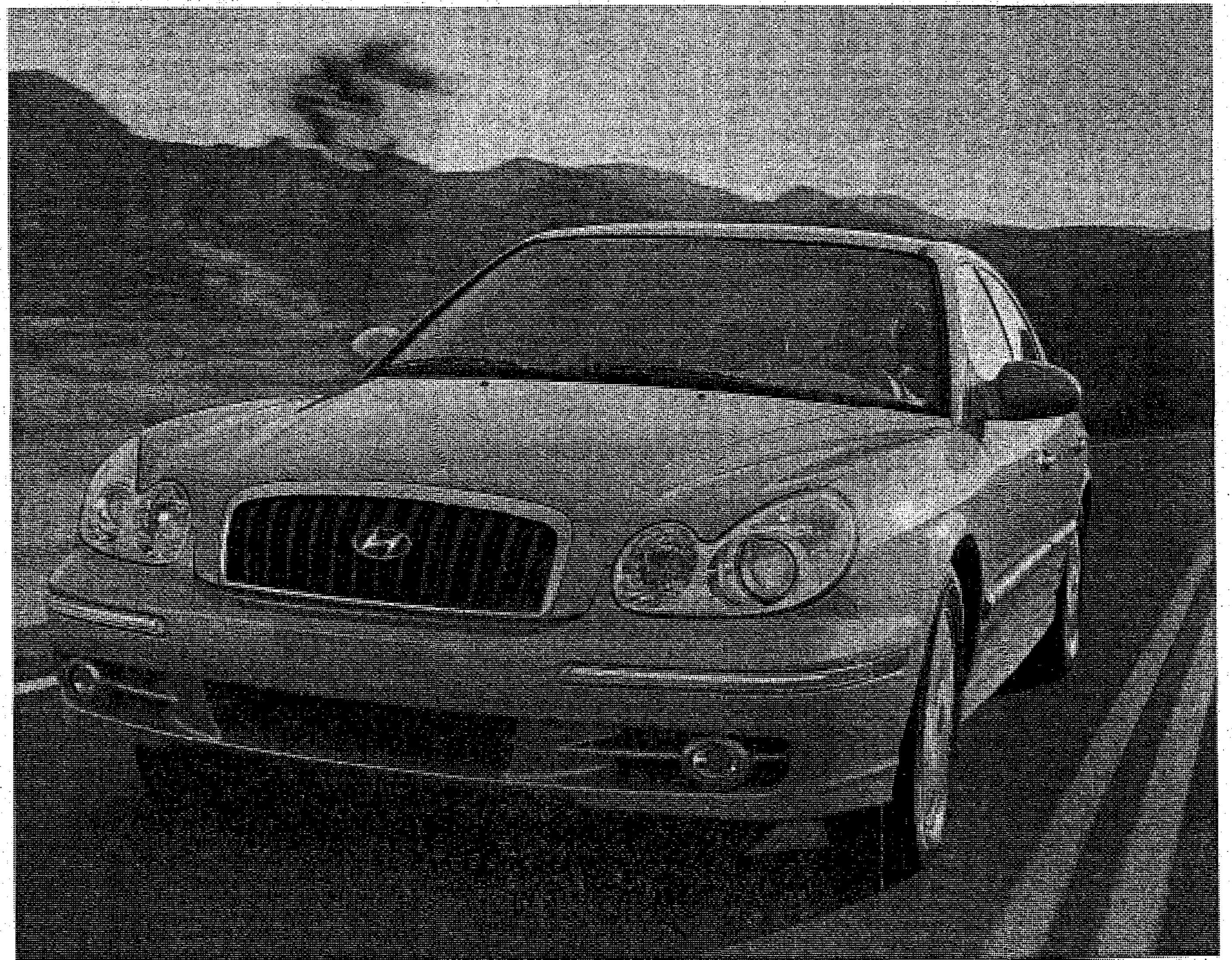

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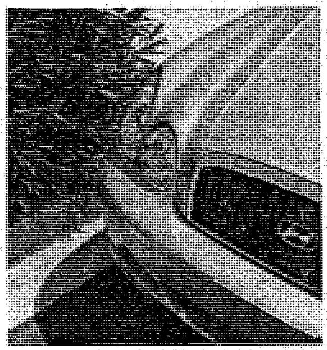

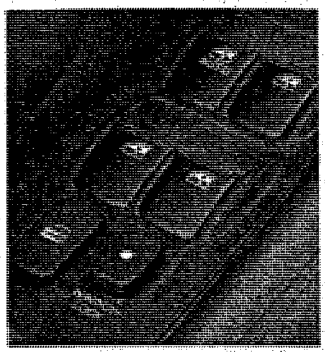

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And snake farms get visited

When the view out the window is better than any TV show

And there's room enough to grow closer

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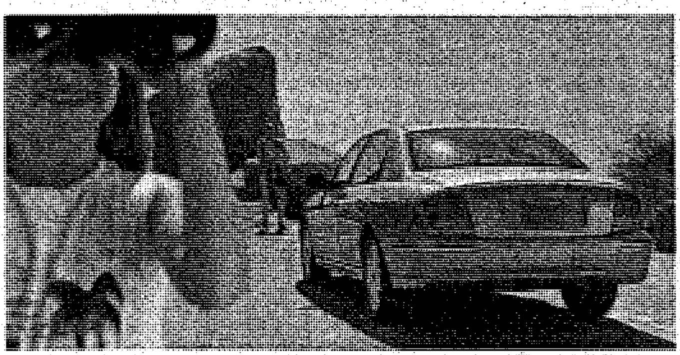

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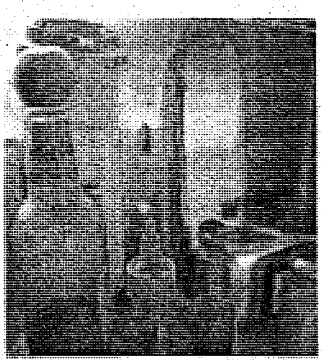

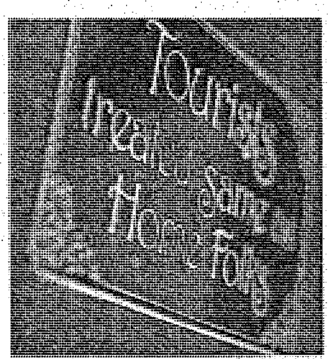

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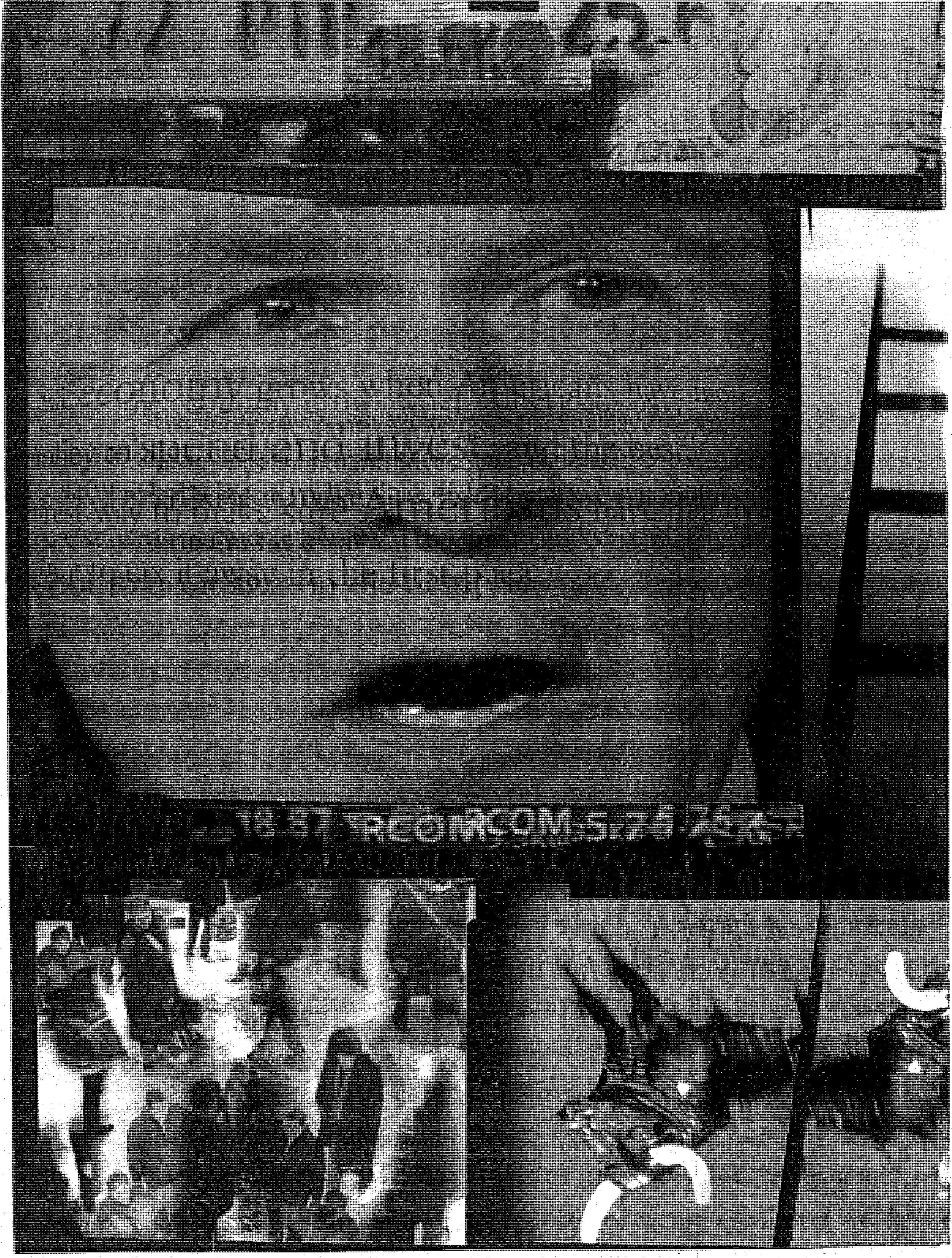
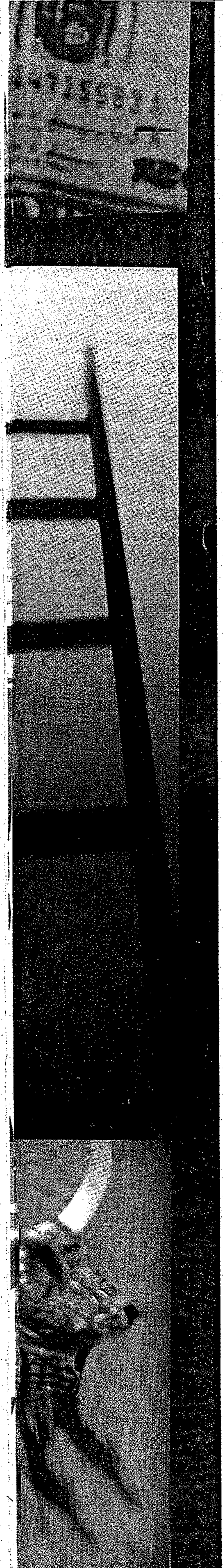

economy grows when Americans have more
money to spend and invest
in the first place



POLICY

WAG THE DOW

President Bush's tax plan is a bold bid to pump up the market and, with it, the economy. Will it work? And what would it mean for your own financial plans? BY AMY FELDMAN

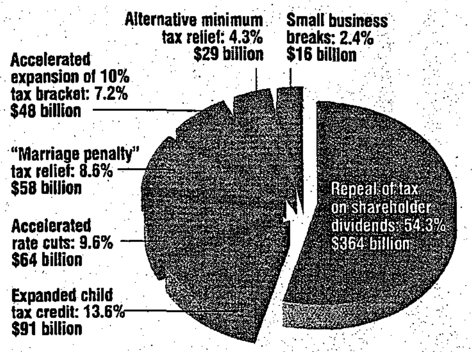
PHOTO ILLUSTRATIONS BY ANASTASIA VASILAKIS

With both houses of Congress under his party's control and the world's mightiest military under his command, George W. Bush may be the most powerful U.S. President since, well, maybe any U.S. President. He's made it clear to the world that he'll flex his muscles overseas with Iraq. But he's also kicking up sand at home, plopping in lawmakers' laps a radical agenda to reshape the economy, the tax code and the financial life of every investor. ► Bush's opening gambit in early January: a proposal for $670 billion in tax cuts to jump-start the economy by juicing up the stock market. (Pols typically target the economy first and let the markets follow.) Then

ALL THE PRESIDENT'S MEANS

The Bush tax plan's pieces

TOTAL CUTS: $670 billion (over 10 years)



Note: The overall plan includes another $4 billion in aid to unemployed people. **Source:** Treasury Department.

Bush put IRAs, 401(k)s and just about every other tax-deferred savings vehicle on the negotiating table with his bold call for new and expanded tax-sheltered savings accounts for retirement, education, housing and medical needs. What could this mean for you? Immediate cuts in income tax rates, a gutting of the tax on shareholder dividends and a wholesale rethinking of how to save for life's biggest challenges. "It would certainly be the most changes in the tax law in a generation," says Gayllis Ward, head of the tax division at money manager Fiduciary Trust.

The President's proposals are controversial, and it's not clear what Congress will pass. But with so many of the financial rules up for grabs, it's vital to understand his broader agenda and its potential impact on your pocketbook. "This is not about an economic growth package for 2003," Commerce Secretary Don Evans, one of the President's oldest pals and his lead salesman on the plan, tells MONEY. "It's not just about a proposal; it's about a mind-set."

That mind-set is nothing less than a return to supply-side economics, out of favor at the White House since the Reagan era (and once famously derided by Bush's father as "voodoo economics"). Supply-siders view tax cuts as the highest kind of public good because they spur economic growth; criticism that cuts favor the rich and fuel budget deficits is dismissed as unsophisticated. "The way it simply works," Evans argues, "is that you cut taxes and that stimulates growth, and that's how you lead to surpluses.... This tired old 'tax cut for the rich' slogan that has been around this town for years and years, it just shows a basic lack of understanding of how our economy works and a basic misunderstanding about who is paying taxes."

Bush has proposed many changes, from accelerated income tax-rate cuts to expansion of the child credit. His call for new savings accounts could require you to dramatically change your investing strategy (as we'll discuss later). But the centerpiece of his plan, in terms of both dollars and philosophy, is his dividend-tax repeal. One could view the dividend chop—which accounts for more than half of Bush's proposed tax cuts—as a cynically smooth political move: More Americans have money in the stock market than ever, the majority of investors are active voters and the White House faces a re-election campaign next year. But the end of double taxation on dividends is also the President's most potent vehicle for creating a more trustworthy stock market and a more conservative long-term economic agenda. To understand what Bush is really after, let's start by looking at what his dividend plan might mean for the markets and the economy, for corporate behavior and for us, the investor class.

FIRST S&P, THEN GDP

It doesn't take an economist to see that something's rotten in the U.S. economy. While the 2001 recession was thankfully brief, the recovery has been choppy. Real GDP growth for 2002

WHO WINS IF DIVIDENDS ARE **TAX-FREE**?

Only 26% of taxpayers reported dividend income to the IRS in 2000 (the latest data available). Among those who do report dividends, the rich account for much, much more of the pie than average Joes do.

INCOME GROUP	% OF ALL RETURNS	% WHO REPORTED DIVIDEND INCOME	% OF ALL DIVIDEND INCOME	AVERAGE DIVIDEND INCOME
Less than $50,000	46%	17%	19%	$1,743
$50,000-$99,999	31%	41%	18%	$2,550
$100,000-$199,999	16%	67%	18%	$4,948
$200,000-$499,999	5%	86%	16%	$12,617
$500,000-$999,999	1%	93%	8%	$31,153
$1 million and up	1%	96%	21%	$134,755

Note: Average dividend income is the average for taxpayers who reported dividends. **Source:** Internal Revenue Service.

Previous spread: Associated Press (Bush); Getty Images (ladder) was 2.4%, dampened by a miserable fourth quarter, and this year's outlook is a bit higher, though not by much. Worse, unemployment has been rising (we've lost 1.9 million jobs over the past two years), and fears over a war in Iraq have cast a pall over Wall Street and Main Street.

If you believe that the best way to improve the economy is to end the stock market's three-year (and counting) collapse, then Bush's proposal sounds great; tax breaks for investors should indeed buoy stocks. But by how much? And at what cost? The administration says eliminating the dividend tax will reduce tax liabilities by $20 billion in 2003 alone. This would translate into a 3.5% to 5.5% shot in the arm for the stock market, figures Goldman Sachs senior economist Ed McKelvey. Not bad, although hardly a return to bull market levels.

But whether—and how much—the Bush plan would stimulate the economy is not clear. The White House figures that its various tax cuts will add 0.6 of a percentage point to GDP growth in 2003 and one percentage point in 2004. Most of the private economists we spoke with don't believe that the impact will be so high. (It takes an awful lot of money to nudge a $10 trillion economy, it seems.) In addition, these economists say, the bulk of any stimulus would come not from the end of dividend taxes but from other cuts in the plan, such as a proposed speedup in rate cuts on income taxes that were slated to start later this decade. In part, that's because wealthier taxpayers—who'll get the lion's share of any dividend break, since they get the majority of dividends—are historically more likely to save or reinvest tax savings than to spend them. (Check out our poll of MONEY readers at right, where just 14% of respondents say they plan to spend any dividend windfall.) In terms of priming the economy, argues Joel Slemrod, a tax policy expert at the University of Michigan, "the dividend exclusion is not good bang for the buck."

As with any tax cut, there are also costs to consider. If the cuts fail to significantly increase tax receipts through higher economic growth, the toll on the federal budget could be extreme. Already the nation's ledger has moved into negative territory, posting a $158 billion deficit in the fiscal year that ended last September; the shortfall ballooning past $300 billion for this fiscal year. Commerce Secretary Evans notes that in proportion to GDP, deficits are nowhere near as large as in times past, like the early 1980s or especially the mid-1940s. He's right. But a sizable deficit can still drag down the economy by forcing the government to issue more bonds, which raises interest rates and makes borrowing more costly for businesses and individuals.

What does the investor class think? Our subscriber poll reveals a statistical dead heat between those who say the most pressing economic concern facing the President is to cut taxes (as GOP leaders argue) and those who want to control the federal deficit to keep interest rates low (the Democrats' current stance). "The debate about the budget deficit," notes Dreyfus economist Dick Hoey, "defines the controversy between the two parties."

Don't forget state and local government budgets, where red ink is also flowing. The 50 states already face some $70 billion in total deficits for the next fiscal year. The elimination of dividend taxes would cost the 43 states that tax those payouts (plus the District of Columbia) an estimated $4.3 billion in lost revenue in fiscal 2004. (For state-by-state details, see the map on page 84.) The indirect impact might be even larger. The tax-free municipal bonds that states and localities use to finance hospitals, schools, roads and the like would have to pay higher yields to compete with tax-free dividends. Standard & Poor's forecasts that muni bond yields could rise between 0.25 and 0.5 percentage points, and California state treasurer Phil Angelides calculates that all states would pay extra interest of between $77 billion and $155 billion over the life of bonds issued during the next 10 years. "The muni market," Angelides says, "is a bit like the corner store that's just been told Wal-Mart's moving in across the street."

THE BOARD ROOM FIX

Since the bull market's collapse, we've seen what happens when companies take on too much debt, play games with numbers and don't think hard about what they're doing with shareholders' money. The repeal of the dividend tax would, in the words of Vice President Dick Cheney, "transform corporate behavior in America." We couldn't agree more. Indeed, the impact of this changing of incentives for all companies and investors may prove longer lasting than any economic or stock market boost.

By giving the tax break only to shareholders of companies that are profitable and pay federal taxes, the Bush plan puts pressure on corporate managements to pay more attention to their cash and what they're going to do with it. (If a company makes less money than it passes out in dividends, only a portion of the dividend will be tax-free.) "We are still feeling the aftermath of what was a near-total breakdown of capital discipline," says Dreyfus' Hoey. "This tax change would force companies to focus on the cash flow

MONEY POLL: THE INVESTOR CLASS SPEAKS OUT

In January we asked a panel of MONEY subscribers about the President's tax proposals.

Which is the more pressing economic concern for President Bush today?
Cutting taxes to stimulate the economy **51.3%**
Controlling the federal deficit to help keep long-term interest rates low **48.7%**

Do you favor or oppose ending taxes on dividend payments?
Favor somewhat or strongly **79.9%**
Oppose somewhat or strongly **20.1%**

Which is your primary reason for favoring a repeal of such taxes?
It will boost the economy. **20.8%**
It will boost the stock market. **30.6%**
It will lower my taxes. **26.6%**
It will increase the money I have to spend. **5.4%**
It will increase the money I have to save or invest. **16.6%**

Do you think Bush's dividend-cut proposal is fair to all taxpayers?
Yes **47.6%** No **52.4%**

Do you think you will personally benefit from his dividend cut?[1]
Yes **75.4%** No **17.7%**

Most likely, what will you do with money from your tax savings?
Spend it. **13.9%**
Save or invest it. **86.1%**

If the plan is approved, how likely would you be to add dividend-paying stocks or funds to your taxable account?
Very or somewhat likely **75.9%**
Not too likely or not at all **24.1%**

Notes: Online survey dates: Jan. 12-27. Total respondents: 536. Margin of error: plus or minus 4.2 to 4.9 percentage points. [1]Others answered "Don't know."

available for either payment of dividends or reinvestment in the business."

The result, in part, would be that corporations would be less reliant on debt as a means of raising money. Why? Today's laws favor debt because corporations can deduct interest payments from their taxable income, something they cannot do with dividend payouts. Eliminating the tax on dividends for individuals would make the stocks of dividend-paying companies more attractive to investors. That, in turn, would make it easier for dividend-paying companies to raise money by issuing stock. And, of course, the greater use of stock vs. debt would improve corporate balance sheets. "Corporations will have different incentives for debt-equity decisions," says University of Michigan's Slemrod. "It will make equity finance more attractive and should change debt-equity ratios down the road." When New Zealand repealed its dividend tax in 1988, for example, debt-to-equity levels at 92 representative companies fell an average of 15%, according to an academic study.

Here's what else could happen if the President's dividend-tax cut passes in anything like its current form.

► It should push more companies to offer dividends. A total of 351 companies in the S&P 500 pay dividends, including the newest member of the dividend club, Microsoft (although its yield is a wispy 0.3%). Certainly, pressure from shareholders to get tax-free payouts will increase. "It's an easy gimme," says Lauriann Kloppenburg, director of equity research at Loomis Sayles.

► Dividend-reinvestment plans (DRIPs) would likely proliferate, as companies seek to both offer shareholders the tax break and recoup the cash for reinvestment in their businesses. In fact, when Australia repealed its dividend tax in 1987, the use of DRIPs as a source of capital exploded—growing from 2.5% of corporate capital raised to an astonishing 33% within five years.

► It could redefine the meaning of growth companies. That's because of what's called the "deemed dividend" provision of the President's proposal. The deemed dividend is seen as a sop to fast-growing technology companies whose investors typically don't get dividends and face 20% capital-gains taxes when they sell. The provision would allow firms that do have retained earnings but don't want to shell out the cash to shareholders in the form of dividends to offer an equivalent tax break by effectively lowering the capital-gains tax their shareholders would owe. Here's the deal: Say a company had $5 a share available for tax-free dividends but chose to retain that money so it could be used to grow operations. The company could declare a deemed dividend; no cash would change hands, but stock owners could increase the cost basis of their shares by $5, reducing their capital-gains liability. So if you originally paid $80 a share, got a deemed dividend of $5 and sold for $85, your capital gain would be zero in the eyes of the IRS. The big picture: Bush doesn't want a dividend-tax cut to put growth stocks at a disadvantage with a higher tax burden. (For more on the dividend proposal, see Ask the Expert, page 69.)

NEW STRATEGIES

Should you adjust your portfolio now to account for these changes? And if so, how? Let's start with the obvious: You don't want to get obsessed with saving a few bucks on taxes and wind up with a rotten portfolio. Even if dividends suddenly become tax-free, the savings alone would have a small impact on the overall performance of most portfolios. Someone in the 30% tax bracket, for instance, would improve returns by only 0.5% a year on an investment in the S&P 500, which has a dividend yield of about 1.9%. And that's assuming all those dividends would qualify for tax-free treatment, which they won't.

On the other hand, the dividend cut would change the dynamics of saving for retirement and other goals by making tax-sheltered accounts like 401(k)s relatively less compelling. That's because they would not get any break on dividend income. Complicating matters: the adminstration's plans to scrap income limits on individual retirement plans, phase out traditional IRAs and create new accounts that resemble Roth IRAs where you could invest up to $7,500 annually. The President also wants a new kind of savings plan for shorter-term needs like college and medical emergencies and a new retirement savings vehicle that would replace 401(k)s and other employer-sponsored plans.

It's big stuff, and no one knows how it might shake out. But it will clearly have implications for all investors. Here's what we suggest you do while Washington debates.

► Don't bail out of tax-deferred 401(k)s, Keoghs and the like. Even if the dividend cut were to pass unchanged, the vast majority of investors will still benefit more from pretax investing than

SO LONG, **IRAs** AND **401(k)s**?

President Bush's tax and savings proposal calls for three new tax-sheltered savings plans for investors.

LIFETIME SAVINGS ACCOUNT

What it is: A new tax-advantaged vehicle for short-term needs: a new home, medical care, college costs. No deduction for contributions, but no tax on future gains.

Contribution limits: $7,500 a year, to be indexed for inflation.

Restrictions: No limits on age, income or holding period.

RETIREMENT SAVINGS ACCOUNT

What it is: An expanded Roth IRA, with the same tax rules (tax on contributions, gains tax-free); it would replace all other IRAs.

Contribution limits: $7,500 a year, to be indexed for inflation.

Restrictions: No income limits. Tax-free withdrawals after 58.

EMPLOYER RETIREMENT SAVINGS ACCOUNT

What it is: A replacement for all 401(k)s and similar company plans, such as 403(b)s. Many rules simplified.

Contribution limits: $12,000 for 2003, rising to **$15,000 in 2006**. Employees age 50 and older can make catch-up contributions.

Restrictions: Similiar to existing 401(k)s.

Source: Treasury Department.

tax-free dividends, especially if you have a long investment horizon.

► If you are eligible for a 401(k) match, save enough in your plan to get the whole amount. That's still free money you can't get anywhere else, so don't pass it up just because legislators may be crafting a new kind of employer plan.

► Once you have locked in your match, consider a Roth IRA. With a Roth, you put in after-tax dollars (current max: $3,000; $3,500 for those 50 and older) and the money grows tax-free forever. If you're eligible (current adjusted gross income under $150,000 if you're married filing jointly), a Roth is still a no-brainer.

IRAQ, GREENSPAN AND WALL STREET

The fate of Bush's tax cuts isn't simply a matter of partisan politics. Here's how the top Wall Street analysts who track Washington's ways are handicapping what will happen. BY JON BIRGER

Will the President's ambitious tax plan actually be adopted? And if so, in what form? We posed those questions to six of Wall Street's leading D.C.-based analysts. Their answers were dramatic—and thought-provoking. For instance, Tom Gallagher of ISI Group, a one-time aide to former Democratic Senate Majority Leader George Mitchell, was the only pundit anticipating a full repeal of the dividend tax—by July 4 at the latest, he insists. Meanwhile, Mark Melcher of *The Political Forum* newsletter—the most ideologically conservative of the Washington research cartel—takes the opposite position: He doubts that any type of tax bill will pass in 2003. "It's going to be a nasty, contentious year," Melcher predicts. "My cynical view is that the only way Congress would pass anything before Christmas is if the economy goes to hell and they decide they have to do something."

The problem for forecasters is that the tax bill's fate seems linked to events with unknowable outcomes—like a war with Iraq. "It's a dynamic process, not one with a predictable route," explains Chuck Gabriel, the Washington analyst at Prudential Financial. Here are some of the variables that Gabriel and others are following.

► **IRAQ** What does war in Iraq have to do with tax policy at home? Plenty. "If it gets resolved favorably and quickly with few casualties, then Bush's job-approval numbers go up, and he probably gets most of what he wants," says Greg Valliere of Schwab Washington Research Group. Prudential's Gabriel also thinks Iraq is a key determinant, but his take differs from Valliere's. If the war goes well, Gabriel says it will be a "cleansing event" that jump-starts the economy and refocuses attention on the federal deficit. "If the economy is recovering and the Fed is back in a tightening mode, the bond markets are going to be saying, 'Let's not and say we did' to further tax cuts," Gabriel predicts. "If that happens, I think the administration's commitment to this could waver."

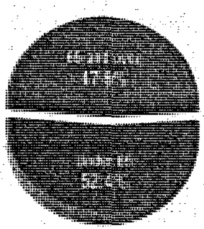
► **GREENSPAN** The last time George W. Bush pushed a big tax plan through Congress, Federal Reserve chairman Alan Greenspan went out on a political limb to endorse a tax cut. "Greenspan caught a lot of grief for that, but it had a huge impact," says Valliere. "Obviously, Alan Greenspan's stamp has tremendous clout in this town."

Greenspan has spoken against the current method of taxing dividends before,

but that doesn't guarantee he'll do so again. In congressional testimony last fall, Greenspan advised that if dividend taxes were to be eliminated, it should happen "within the context of the requirement that we maintain an appropriate fiscally disciplined system." In other words, he has plenty of wiggle room.

► **SWEETENERS** Given the early resistance to the tax plan, big-time bargaining will be needed to get 51 votes in the Senate. Bush's retirement account overhaul should help his cause, since reforms were already being kicked around in the Senate. Possible amendments: Les Alperstein of Washington Analysis sees an acceleration of depreciation deductions for business equipment, while Joan Woodward of Goldman Sachs anticipates an increase in the capital-loss tax deduction, from $3,000 to maybe $10,000; both expect a compromise on dividends, perhaps cutting the tax to the capital-gains rate. However it all plays out, taxpayers can take heart that Congress is squabbling over how to give back their money instead of how to spend it.

SENIORS GOT NEARLY HALF OF THE **$147 BILLION** IN TAXABLE DIVIDEND INCOME IN 2000.



TOTAL TAXABLE DIVIDEND INCOME

Source: AARP, based on latest available IRS and Social Security Administration data.

► If you're close to retirement and dividend-tax cuts pass, you may want to add to your taxable account or Roth rather than stuff extra dollars into your 401(k), since you'll have fewer years for your money to grow tax deferred. But don't make changes until a final bill becomes law.

► Don't change allocations either until a new tax law is signed. The details will determine whether you'll want more stocks in your taxable account and more bonds in your tax-advantaged account.

► We'd hold off on after-tax contributions to nondeductible IRAs and variable annuities with significant surrender charges. These accounts offer no pretax compounding advantage; your money simply grows tax deferred until withdrawn, when it is taxed as income. Bush's new savings accounts would offer tax-free deferral with more flexibility on withdrawals and no income tax at the end of the road.

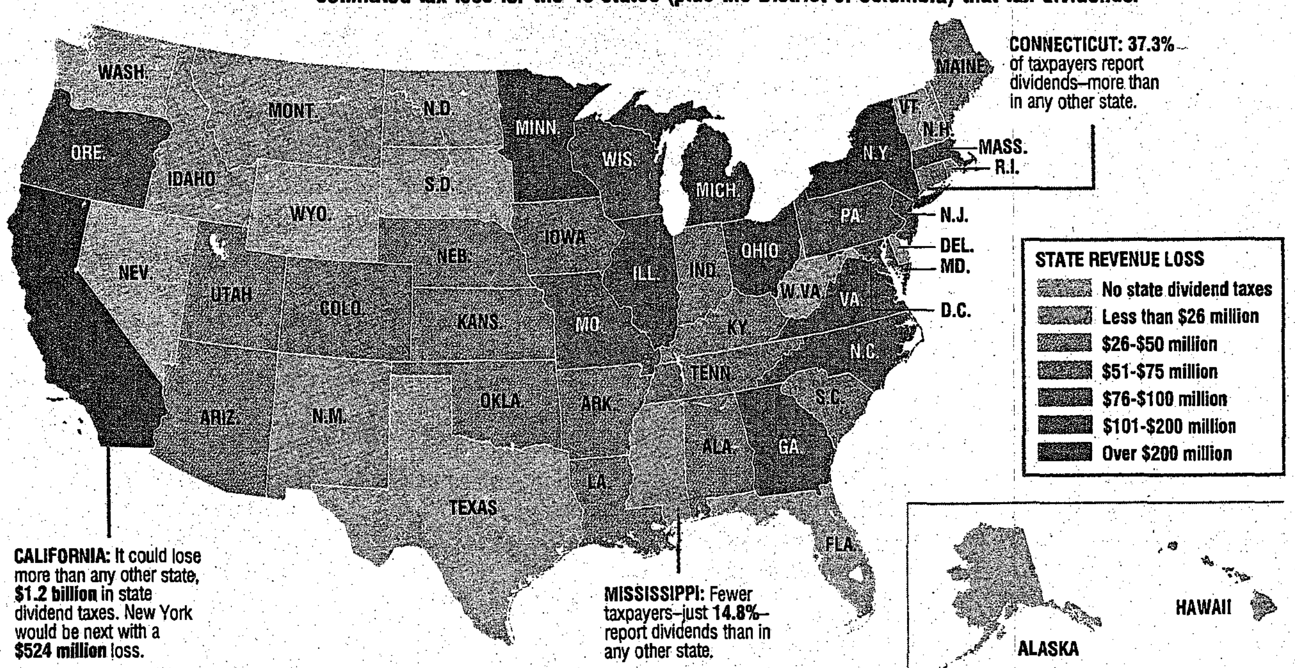
STOCKS, SECTORS

Now for the nitty-gritty: Are there specific stocks or areas of the market that will fare better—or worse—if the President's plan passes? Here the dividend repeal is the main factor. Yet not all companies that pay dividends will be equally attractive under the Bush plan—and some that don't pay dividends may be more attractive. Under the President's proposal, only companies that make money and pay taxes at the corporate level will be able to give a dividend-tax break to shareholders. Investors in, say, Goodyear, which received a tax credit in 2001, would still owe tax on their dividends, while shareholders of Eastman Kodak, which paid out more in dividends than it earned, would get only a partial benefit. In fact, while 351 companies in the S&P 500 offer dividends, only 292 of them could offer shareholders fully tax-free dividends. (To find out if a company paid tax, look at the supplemental disclosure footnote to the cash-flow statement in the company's annual report.)

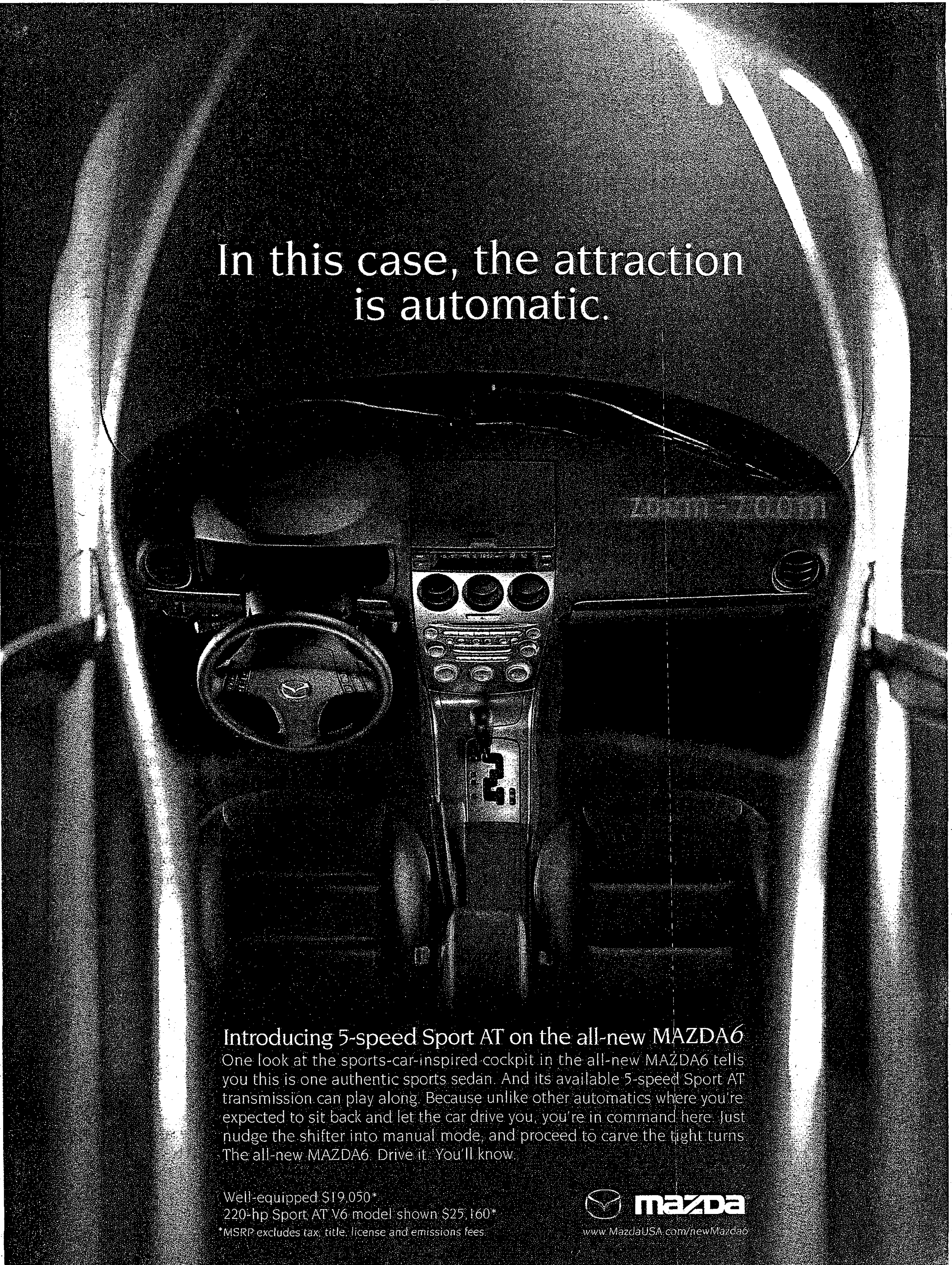
But you don't want to jump into a stock simply because of a high yield. Many dividend stalwarts, like the regional Bell telephone companies and utilities, have rallied since the market bottomed last October, likely the result of increased publicity over a possible dividend-tax cut. Yet these sectors also have some of the most gut-wrenching business problems and the highest levels of debt. Instead, stick with companies that have modest payout ratios (dividends per share to operating earnings per share of less than 50%) along with relatively modest debt loads (a debt-to-equity ratio of less than 50% is a good, cautious yardstick). You want a com-

WHICH STATES HAVE THE MOST TO LOSE?

Ending federal taxes on dividends would likely end state taxes on the payouts too. Here's next year's estimated tax loss for the 43 states (plus the District of Columbia) that tax dividends.



Notes: Assumes that all states that currently tax dividends would no longer do so. All estimates based on IRS data on taxable dividend income by state. **Sources:** Center on Budget and Policy Priorities, Tax Foundation.


In this case, the attraction is automatic.
Introducing 5-speed Sport AT on the all-new MAZDA6
One look at the sports-car-inspired cockpit in the all-new MAZDA6 tells you this is one authentic sports sedan. And its available 5-speed Sport AT transmission can play along. Because unlike other automatics where you're expected to sit back and let the car drive you, you're in command here. Just nudge the shifter into manual mode, and proceed to carve the tight turns. The all-new MAZDA6. Drive it. You'll know.
Well-equipped $19,050*
220-hp Sport AT V6 model shown $25,160*
*MSRP excludes tax, title, license and emissions fees.
mazda
www.MazdaUSA.com/newMazda6

pany that has plenty of cash available to expand the business or raise the dividend.

Wendell Perkins, director of equities for JohnsonFamily funds, suggests **3M, General Electric, Procter & Gamble** and **Pfizer.** All offer decent dividends (yields ranged from 2% to 3.4% at the end of January) and sport payout ratios between 34% and 48%—leaving them lots of cash after paying dividends. Similarly, Lynn Yturri, manager of One Group Equity Income fund, points to **Merck,** with a 2.6% yield and 45% payout ratio, and **Coca-Cola,** with a 2% yield and similar payout.

Steve Galbraith, Morgan Stanley's chief U.S. strategist, suggests banks with strong records of consistent dividend growth, like **Citigroup, U.S. Bancorp** and **Washington Mutual.** Be careful, though: Some longtime dividend payers—such as FleetBoston—have operational woes that could far exceed their potential dividend benefits.

Cash-rich companies that could start paying dividends are also intriguing. **Microsoft** announced in January that it would begin to pay a dividend. Its yield isn't much, but with $40 billion in cash, Microsoft has the resources to raise payouts (or offer deemed dividends) over time. Fund manager Yturri also points to **Oracle,** which has $5 billion in cash and has discussed instituting a dividend in the wake of Microsoft's move.

Who loses? Real estate investment trusts. Since REITs pay no corporate taxes but instead must pass along 90% of profits to shareholders in the form of dividends, their owners will get no tax break. Worse, says Lehman REIT analyst David Shulman, the industry's prospects look bad these days. Real estate is based on long-term leases, so when those leases expire the effects of a weak economy will hit REIT performance. After three years of besting stocks, Shulman thinks REITs will trail equities in 2003.

What about tax-free muni bonds? A break on dividends will mean new competition. Yet we don't believe investors should give up on munis. The reasons: valuations and risk. Munis now yield close to 100% of what Treasury bonds pay out vs. 80% in typical times. That's quite attractive. Plus, the S&P 500's average yield is 1.9% vs. 3.85% for a 10-year triple-A muni. Meanwhile, even so-called "safe" dividend-paying stocks can be risky, as anyone who has invested in the historically high-yielding utility sector—down 52% these past two years—surely knows. The reason investors buy munis is for their stability—they promise a specific payout and almost always deliver—while a high-dividend-yielding stock can more easily lose you money. Owners of Ford, for example, with a dividend yield of about 4.4%, saw their shares fall 39% in the past 12 months. "With more yield and higher credit quality for munis, the substitution of stocks for munis strikes me as unlikely," says Mark McCray, manager of Pimco Municipal Bond fund.

ADDING IT ALL UP

Are President Bush's tax and savings proposals the best way to draw more Americans and their money back into the markets—propelling stocks, the economy and, ultimately, federal tax receipts to new heights? Stay tuned. Waiting in the wings, no doubt, are even more expansive plans. On the tax side, there's long been talk of ending the estate tax and changing the alternative minimum tax as it hits more and more middle-income filers. Then of course there's Social Security and questions about restructuring or even privatizing this widest of government safety nets. Bush alluded to this in his latest State of the Union address. "As we work together to keep Social Security sound and reliable," he said, "we must offer younger workers a chance to invest in retirement accounts that they will control and they will own."

In some ways, Bush's recent proposals may simply be training wheels for an even more extensive overhaul of our financial lives. The President clearly has financial revolution on his agenda—a mind-set, as Commerce Secretary Evans put it, to do things differently. As the President's ideas move through Congress, smart people will line up to debate whether his changes will primarily benefit the wealthy, whether the tax on dividends is the only area of double taxation that should be addressed and whether the federal budget will be helped or hurt in the long run. One thing is for sure, though: The investor class—however you choose to define us—has taken center stage in Washington. For better or for worse, the focus is on us.

ADDITIONAL REPORTING BY MAYA JACKSON, ELLEN MCGIRT, NICK PACHETTI, ILANA POLYAK AND PENELOPE WANG

YIELD SIGNS

Average dividend yields for S&P 500 sectors, plus the companies with the fattest yields. Remember: Yields can't always be sustained.

UTILITIES	5.4%	Teco Energy	10.3%
		El Paso	10.1
		American Electric Power	10.0
TELECOM	3.4%	SBC Communications	4.4%
		Sprint	4.2
		Verizon Communications	4.1
CONSUMER STAPLES	2.6%	R.J. Reynolds Tobacco	9.0%
		Altria Group (né Philip Morris)	6.9
		UST	6.3
FINANCIALS	2.6%	Equity Office Properties	8.4%
		Equity Residential	7.2
		Simon Property Group	6.8
MATERIALS	2.6%	Eastman Chemical	5.1%
		Dow Chemical	4.6
		Allegheny Technologies	4.3
ENERGY	2.5%	Marathon Oil	4.3%
		ChevronTexaco	4.3
		Kerr-McGee	4.2
INDUSTRIALS	2.0%	Cummins	4.7%
		Goodrich	4.7
		R.R. Donnelley	4.5
CONSUMER DISCRETIONARY	2.0%	Goodyear	8.1%
		Eastman Kodak	6.0
		Tupperware	5.6
HEALTH CARE	1.4%	Bristol-Myers Squibb	4.7%
		Schering-Plough	3.6
		Cigna	3.1
INFO TECH	1.0%	Electronic Data Systems	3.6%
		PerkinElmer	3.5
		Motorola	1.9

Note: As of Jan. 29. Source: Baseline.

THE WHITE HOUSE 508641
WASHINGTON

Date: 2/28/03

To: Barry Jackson

From: Strategic Initiatives Susan

x FYI

___ Appropriate Action

___ Direct Response

___ Prepare Response For My Signature

___ Per Our Conversation

___ Let's Discuss

___ Per Your Request

___ Please Return

___ Deadline

___ Other

Comments: ___

U.S. GLOBAL LEADERSHIP
CAMPAIGN TO PRESERVE

Facsimile Cover Sheet

To: Senior Advisor to the President
Karl Rove
Fax number: (202) 456-0191
From: U.S. Global Leadership Campaign
Date: February 28, 2003

Number of pages including cover sheet: 3

If you do not receive all pages please contact sender by telephone at 202.955.1398.

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February 28, 2003

President George W. Bush
The White House
1600 Pennsylvania Avenue, N.W.
Washington, D.C. 20500

Dear Mr. President:

The millions of Americans represented by the U.S. Global Leadership Campaign applaud your proposed strong increase for the 150 International Affairs Budget as part of your FY2004 request to Congress. We believe this increase is an essential step forward in restoring this account to historical levels and providing the tools to respond to current needs. The members of this coalition have long recognized that the International Affairs budget is an essential tool to protecting our national security, promoting our economic prosperity, and providing critical humanitarian and development support, vital to global stability.

As Congress begins its deliberations on the FY04 budget, we are urging Congress to support *no less than* your request for the 150 Budget.

- It is critical to remember that this year's 150 request is still more than 25 percent below the high water mark of the Reagan years in real terms. As you and Congressional leaders have pointed out on many occasions since September 11, the challenges we face as a nation today are no less daunting than those we confronted during the Cold War.

- We are urging Congress to ensure new money be devoted to any new initiatives and that funding for existing worthy measures not be displaced. Principal among these new initiatives is your proposed $1.3 billion for the new Millennium Challenge Account, a bold initiative to ensure that increased development assistance is driven by transparent economic, political, and social criteria.

- We strongly encourage both your Administration and Congress to continue to look – as they have since 9/11 – at the important role the 150 account contributes during any emergency supplemental funding requests that might emerge in calendar year 2003, especially in light of a potential war.

There is a strong consensus among the American public, Congress, White House officials, and national security experts from both sides of the aisle that the International Affairs budget is an essential tool in our fight against world terrorism and in our efforts to promote global stability.

Nowhere was this message more compelling than in a letter sent to Dr. Condoleezza Rice late last year, signed by eight former National Security Advisors, urging your Administration to support "a substantial increase in the FY04 150 International Affairs budget as part of our nation's comprehensive security policy." In addition, last fall a record number of Congressional leaders signed a letter urging a robust increase in the FY04 International Affairs budget.

Our nationwide, grassroots constituency for U.S. engagement abroad strongly supports no less than your Administration's requested increase in the FY04 150 Account. We pledge to work with your Administration and Congress to support a continuing effort to restore funding for these essential programs.

Sincerely,

George

George Ingram
President

Liz Schrayer
Campaign Director

cc: Secretary of State Colin Powell
National Security Advisor Condoleezza Rice
OMB Director Mitch Daniels
Senior Advisor to the President Karl Rove

Decline - He's traveling 508641
declined on 2/28

NMA
THE AMERICAN RESOURCE

JACK N. GERARD
President and CEO

February 27, 2003

Mr. Karl Rove
Senior Advisor to the President
The White House
1600 Pennsylvania Avenue, N.W.
Washington, DC 20500

Dear Karl:

On behalf of the National Mining Association, I'd like to invite you to address the Spring meeting of our Board of Directors on March 20, 2003 at the Washington Court Hotel here in Washington. Hopefully, you can join us for a 7:30 breakfast or a 12:15 luncheon, but we will try to accommodate your scheduling needs. Our members would be most interested in your thoughts regarding the President's agenda on the economy, energy policy legislation and the general importance of greater reliance on domestic energy and mineral resources.

Attending the meeting will be the leaders of America's mining industry including coal, metal and mineral producers, equipment manufacturers and others who supply goods and services to the mining industry. Mining employs over one million workers and pumps over half a trillion dollars into the U.S. economy each year.

Dan Gerkin of our Government Affairs staff will be in contact with your office to answer any questions and coordinate your participation. I hope your busy schedule will allow you to attend. If you have any questions, please don't hesitate to call me at (202) 463-2647. I look forward to working with you on this most prestigious and worthwhile event.

Karl - Hope you can join us. Jack

Sincerely,

Jack

Jack N. Gerard

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The George W. Bush Library

FORM	SUBJECT/TITLE	PAGES	DATE	RESTRICTION(S)
Memorandum	Invitation for Karl to Attend the National Mining Association's... - To: Susan Ralston - From: Ken Mehlman	1	02/27/2003	P5; P6/b6;

This marker identifies the original location of the withdrawn item listed above. For a complete list of items withdrawn from this folder, see the Withdrawal/Redaction Sheet at the front of the folder.

COLLECTION:
Records Management, White House Office of
SERIES:
Subject Files - FG006-27 (Office of Senior Advisor - Karl Rove)
FOLDER TITLE:
508641 [1]
FRC ID:
9707
OA Num.:
10731
NARA Num.:
10789

FOIA IDs and Segments:
2015-0037-F

RESTRICTION CODES

Presidential Records Act - [44 U.S.C. 2204(a)]

P1 National Security Classified Information [(a)(1) of the PRA]
P2 Relating to the appointment to Federal office [(a)(2) of the PRA]
P3 Release would violate a Federal statute [(a)(3) of the PRA]
P4 Release would disclose trade secrets or confidential commercial or financial information [(a)(4) of the PRA]
P5 Release would disclose confidential advise between the President and his advisors, or between such advisors [a)(5) of the PRA]
P6 Release would constitute a clearly unwarranted invasion of personal privacy [(a)(6) of the PRA]

PRM. Personal record misfile defined in accordance with 44 U.S.C. 2201(3).

Deed of Gift Restrictions

A. Closed by Executive Order 13526 governing access to national security information.
B. Closed by statute or by the agency which originated the document.
C. Closed in accordance with restrictions contained in donor's deed of gift.

Freedom of Information Act - [5 U.S.C. 552(b)]

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Records Not Subject to FOIA

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This Document was withdrawn on 2/8/2016 by erl

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Jack N. Gerard

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FORM	SUBJECT/TITLE	PAGES	DATE	RESTRICTION(S)
Email	Here's Where We Are on Statement for Tomorrow - To: Karl Rove, et al. - From: Phil Cooney	1	02/26/2003	P5;

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FORM	SUBJECT/TITLE	PAGES	DATE	RESTRICTION(S)
Email	FW: My Note to Rush re: Rather - To: Susan Ralston - From: Karl Rove	2	02/28/2003	PRM;

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508641

THE WHITE HOUSE
WASHINGTON

Date: 3/3/03

To: Ruben Barrales, Tim Goeglein

From: Strategic Initiatives Susan Ralston

✓ FYI

___ Appropriate Action

___ Direct Response

___ Prepare Response For My Signature

___ Per Our Conversation

___ Let's Discuss

___ Per Your Request

___ Please Return

___ Deadline

___ Other

Comments: ___

Ruben
Tim - FYI

ATR

AMERICANS FOR TAX REFORM

FAX TRANSMITTAL

1920 L STREET, N.W. - SUITE 200 - WASHINGTON, DC 20036 - 202-785-0266 - HTTP://WWW.ATR.ORG

TO: Mr. Karl Rove

FAX: (202) 456-0191

FROM: Karen Bailey

Americans for Tax Reform
1920 L Street, NW Suite 200
Washington, DC 20036
(202) 785-0266
(202) 785-0261 (fax)

DATE: March 3, 2003

PAGES (Including Cover): 6

Comments: Mr. Rove,
Attached is the March 3, 2003 update on the legislative advisory project. Also attached is the update on the Estrada resolutions as well as a news article on New Jersey introducing the Estrada resolution.
~ Karen

KB

ESTRADA RESOLUTION OVERVIEW

As of 3-Mar-03

*** Indicates the resolution has passed**

Underline Indicates resolution has been introduced

Roman indicates commitment to have resolution introduced

Arkansas: House Resolution will be introduced on March 4, 2003

California: Will be introduced in both Senate and House

Florida: House will most likely introduce

Illinois: House will introduce (currently being drafted)

New Mexico: Introduced in the House

New Jersey: Introduced in the House

Nevada: House will introduce

New York: Proclamation by Senate President has been promised

South Carolina: House will introduce, Senate most likely will introduce

South Dakota: Senate will introduce

Washington: Has already been introduced in the House

Numbers Overview:

3 Chambers Have Introduced

9 Chambers Intending to Introduce

0 Passed

Assembly Republican News

Visit us at: www.njassemblyrepublicans.com

February 24, 2003 Republican Leader Paul DiGaetano/201-933-0533

Assembly Republican Office/609-292-5339

DiGAETANO SPONSORS RESOLUTION CALLING ON CORZINE AND LAUTENBERG TO APPROVE ESTRADA NOMINATION

URGES SENATORS TO SUPPORT APPOINTMENT TO APPELLATE COURT

Assembly Republican Leader Paul DiGaetano Monday introduced a resolution calling on New Jersey's U.S. Senators, Jon Corzine and Frank Lautenberg, to support the nomination of Miguel Estrada to the United States Court of Appeals for the District of Columbia.

"I am calling on New Jersey's two United States Senators, Jon Corzine and Frank Lautenberg, to approve the nomination of Miguel Estrada to the U.S. Court of Appeals," said DiGaetano, R-Essex, Passaic, and Bergen. "I also would ask that both Senators Corzine and Lautenberg urge their colleagues in the Democrat caucus to stop playing politics with this nomination."

The Assembly Resolution calls on Corzine and Lautenberg to support the nomination of Estrada, which has been bottled up by Democrat opposition in the U.S. Senate.

"Mr. Estrada has a distinguished record as a lawyer and would be an excellent choice to sit on the appellate bench," DiGaetano said. "I also believe that appointing Mr. Estrada will enhance the diversity of our courts as he will become the first Hispanic judge to serve on the Court of Appeals."

"I think most New Jersey residents would be disappointed to hear that their two representatives were using their positions to block the nomination of a qualified individual who could bring much-needed diversity to the federal bench, just to score political points against our President. I urge Senators Corzine and Lautenberg to get behind this nomination."

#####

Legislative Advisory Project Brief Overview

As of 3-Mar-03

*** Indicates the resolution has passed**
Underline Indicates resolution has been introduced
Roman indicates commitment to have resolution introduced

Tort Reform
- Arkansas (H)
- California (S)
- California (H)
- **Colorado (S)***
- Colorado (H) – Joint Resolution
- Florida (H)
- Georgia (S)
- Idaho (S)
- Idaho (H)
- Illinois (H)
- Iowa (S)
- Iowa (H)
- Kansas (H)
- Maryland (S)
- Maryland (H) – Joint Resolution
- Minnesota (H)
- Minnesota (S)
- New Mexico (H)
- New Mexico (S) - Joint Resolution
- Oregon (H)
- Pennsylvania (H)
- South Carolina (H)
- Wisconsin (S)

Permanently Repealing the Death Tax
- Alaska (H)
- Alaska (S) – Joint Resolution
- Arkansas (H)
- Arkansas (S) – Concurrent Resolution
- California (S)
- California (H)
- **Colorado (S)***
- Colorado (H) – Joint Resolution
- Florida (H)
- Florida (S)
- **Idaho (S)***
- Idaho(H) - Joint Memorial
- Illinois (H)
- Iowa (S)
- Iowa (H)
- Kansas (H)
- **Kentucky (S)***
- Maryland (S)
- Maryland (H) – Joint Resolution
- Michigan (H)
- Minnesota (S)
- New Mexico (H)
- New Mexico (S) – Joint Resolution
- North Carolina (S)
- **North Dakota (H)***
- North Dakota (S) - Concurrent Resolution
- Oregon (H)
- Pennsylvania (H)
- **South Carolina (H)***
- South Carolina (S) – Concurrent Resolution
- Texas (H)
- **Utah (H)***
- **Utah (S) - Joint Resolution***
- Washington (S)
- Washington (H) – Joint Resolution
- Wisconsin (S)

Abolishing the Alternative Minimum Tax
- Arkansas (H)
- California (S)
- California (H)
- Colorado (S)
- Colorado (H)
- Florida (H)
- Hawaii (S)
- **Idaho (S) ***
- Idaho (H) - Joint Memorial
- Illinois (H)
- Iowa (S)
- Iowa (H)
- Kansas (H)
- Michigan (H)
- Minnesota (S)
- New Jersey (H)
- New Mexico (H)
- New Mexico (S) – Joint Resolution
- Oregon (H)
- Pennsylvania (H)
- **South Carolina (H)***
- South Carolina (S)
- Texas (H)?
- **Utah (H)***
- Utah (S) – Joint Resolution
- **Washington (H)***
- Washington (S) – Joint Resolution
- Wisconsin (S)

Making the 2001 Savings Provisions Permanent
- Arkansas (H)
- California (S)
- California (H)
- Colorado (S)
- Colorado (H)
- Florida (H)
- Hawaii (S)
- Idaho (S)
- Idaho (H)
- Illinois (H)
- Iowa (S)
- Iowa (H)
- Kansas (H)
- Michigan (H)
- **New Mexico (H)***
- New Mexico (S) – Joint Resolution
- Oregon (H)
- Pennsylvania (H)
- **South Carolina (H)***

- South Carolina (S) – Concurrent Resolution
- Texas (H) ?
- Wisconsin (S)

Supporting the President's 2003 Economic Growth and Tax Relief Package

- Arkansas (H)
- California (S)
- California (H)
- Colorado (S)
- Colorado (H)
- Florida (H)
- Hawaii (S)
- Idaho (S)
- Idaho (H)
- Illinois (H)
- Iowa (S)
- Iowa (H)
- Kansas (H)
- Michigan (H)
- Minnesota (S)
- New Mexico (H)
- New Mexico (S) – Joint Resolution
- **North Dakota (H)***
- North Dakota (S) - Concurrent Resolution
- Ohio (H)
- Oregon (H)
- Pennsylvania (H)
- South Carolina (H)
- Texas (H)
- Washington (S)
- Washington (H) – Joint Resolution
- Wisconsin (S)
- Wisconsin (H) - Joint Resolution

Passing the Defense Appropriations Bill First

- **Arkansas (H)***
- California (S)
- **Colorado (S)***
- **Colorado (H)***
- Florida (H)
- Hawaii (S)
- Illinois (H)
- Iowa (S)
- Iowa (H)
- Kansas (H)
- **Kentucky (S)***
- New Mexico (H)
- New Mexico (S) – Joint Resolution
- Oregon (H)
- Pennsylvania (H)
- **South Carolina (H)***
- South Carolina (S) – Concurrent Resolution
- Wisconsin (S)

Supporting a National Missile Defense System

- Alaska (H)
- Alaska (S) – Joint Resolution
- Arizona (H)
- Arizona (S) – Concurrent Resolution
- Arkansas (H)
- California (S)
- **Colorado (S)***
- Colorado (H) – Joint Resolution
- Florida (H)
- Hawaii (S)
- Illinois (H)
- Iowa (S)
- Iowa (H)
- Kansas (H)
- Minnesota (H)
- Minnesota (S)
- Missouri (H)
- New Mexico (H)
- New Mexico (S) – Joint Resolution
- Oregon (H)
- Pennsylvania (H)
- **South Carolina (H)***
- **South Carolina (S) ***
- Texas (H)
- **Utah (H)***
- **Utah (S) – Joint Resolution***
- **Virginia (H)***
- Washington (S)
- Washington (H) – Joint Resolution
- Wisconsin (S)

Supporting the President on His Decision with Regard to Iraq

- Arkansas (H)
- California (S)
- California (H)
- **Colorado (S)***
- Colorado (H) – Joint Resolution
- Florida (H)
- **Georgia (H)***
- Hawaii (S)
- **Hawaii (H)***
- Idaho (S) – Concurrent Resolution
- Idaho (H)
- Illinois (H)
- **Iowa (S)***
- Iowa (H)
- Kansas (H)
- **Kentucky (H)*** - Commends the troops
- **Kentucky (S)*** - Commends the troops
- New Mexico (H)
- New Mexico (S) – Joint Resolution
- **Oklahoma (H)***
- Oklahoma (S) - Concurrent Resolution
- Oregon (H)
- Pennsylvania (H)
- **South Carolina (H)***
- **South Carolina (S)* – Concurrent Resolution**
- South Dakota
- Utah (H)
- Wisconsin (S)

<u>Overview of the Numbers (# of Chambers)</u>
Tort Reform:
1 Passed, 7 Introduced, 15 Committed to Introduce
Death Tax:
7 Passed, 12 Introduced, 17 Committed to Introduce
Alternative Minimum Tax:
3 Passed, 7 Introduced, 18 Committed to Introduce
Savings Provisions:
2 Passed, 5 Introduced, 15 Committed to Introduce
President's Economic Package:
1 Passed, 9 Introduced, 16 Committed to Introduce
Pass Defense App. First:
5 Passed, 1 Introduced, 12 Committed
National Missile Defense System:
5 Passed, 10 Introduced, 15 Committed
Iraq Resolution:
9 Passed, 7 Introduced, 13 Committed

THE WHITE HOUSE 508641

WASHINGTON

Date: 3/3/03

To: ~~Ken Mehlman~~

From: Strategic Initiatives Karl Rove / Susan Ralston

✓ FYI

___ Appropriate Action

___ Direct Response

___ Prepare Response For My Signature

___ Per Our Conversation

___ Let's Discuss

___ Per Your Request

___ Please Return

___ Deadline

___ Other

Comments: ___

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FORM	SUBJECT/TITLE	PAGES	DATE	RESTRICTION(S)
Letter	[Thanks] - To: Karl Rove - From: Don Eberly	1	02/12/2003	PRM;

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FORM	SUBJECT/TITLE	PAGES	DATE	RESTRICTION(S)
Memorandum	The Emergency Steel Loan Guarantee Board... - To: Karl Rove, et al. - From: Coddy Johnson	3	03/04/2003	P5;

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FORM	SUBJECT/TITLE	PAGES	DATE	RESTRICTION(S)
Email	Re: Two Revised Documents for Tomorrow's... [with attachments] - To: Charles Blahous - From: Charles Blahous	4	03/03/2003	P5;

This marker identifies the original location of the withdrawn item listed above. For a complete list of items withdrawn from this folder, see the Withdrawal/Redaction Sheet at the front of the folder.

COLLECTION:
Records Management, White House Office of
SERIES:
Subject Files - FG006-27 (Office of Senior Advisor - Karl Rove)
FOLDER TITLE:
508641 [1]
FRC ID:
9707
OA Num.:
10731
NARA Num.:
10789

FOIA IDs and Segments:
2015-0037-F

RESTRICTION CODES

Presidential Records Act - [44 U.S.C. 2204(a)]

P1 National Security Classified Information [(a)(1) of the PRA]
P2 Relating to the appointment to Federal office [(a)(2) of the PRA]
P3 Release would violate a Federal statute [(a)(3) of the PRA]
P4 Release would disclose trade secrets or confidential commercial or financial information [(a)(4) of the PRA]
P5 Release would disclose confidential advise between the President and his advisors, or between such advisors [a)(5) of the PRA]
P6 Release would constitute a clearly unwarranted invasion of personal privacy [(a)(6) of the PRA]

PRM. Personal record misfile defined in accordance with 44 U.S.C. 2201(3).

Deed of Gift Restrictions

A. Closed by Executive Order 13526 governing access to national security information.
B. Closed by statute or by the agency which originated the document.
C. Closed in accordance with restrictions contained in donor's deed of gift.

Freedom of Information Act - [5 U.S.C. 552(b)]

b(1) National security classified information [(b)(1) of the FOIA]
b(2) Release would disclose internal personnel rules and practices of an agency [(b)(2) of the FOIA]
b(3) Release would violate a Federal statute [(b)(3) of the FOIA]
b(4) Release would disclose trade secrets or confidential or financial information [(b)(4) of the FOIA]
b(6) Release would constitute a clearly unwarranted invasion of personal privacy [(b)(6) of the FOIA]
b(7) Release would disclose information compiled for law enforcement purposes [(b)(7) of the FOIA]
b(8) Release would disclose information concerning the regulation of financial institutions [(b)(8) of the FOIA]
b(9) Release would disclose geological or geophysical information concerning wells [(b)(9) of the FOIA]

Records Not Subject to FOIA

Court Sealed - The document is withheld under a court seal and is not subject to the Freedom of Information Act.

This Document was withdrawn on 2/8/2016 by erl

Withdrawal Marker
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FORM	SUBJECT/TITLE	PAGES	DATE	RESTRICTION(S)
Memorandum	Suggestions RE: FCC [with attachment] - To: Joshua Bolten, et al. - From: Karl Rove	2	03/04/2003	P5;

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5086411

THE WHITE HOUSE

WASHINGTON

Date: 3/3/03

To: Dr. Rice, Tucker Eskew, Tim Goeglein

From: Strategic Initiatives Karl Rove

✓ FYI

_____ Appropriate Action

_____ Direct Response

_____ Prepare Response For My Signature

_____ Per Our Conversation

_____ Let's Discuss

_____ Per Your Request

_____ Please Return

_____ Deadline

_____ Other

Comments:

Withdrawal Marker
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FORM	SUBJECT/TITLE	PAGES	DATE	RESTRICTION(S)
Email	Fw: - To: Susan Ralston - From: Karl Rove	1	03/02/2003	PRM;

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28/02 2003 01:53 FAX 020 7724 2393

508641

~~Sarah - Let him know the next few are booked. No time~~

SR

Declined 3/4/03

To Karl Rove

From William Shawcross

(b)(6)

Fax 44 207 724 2393

27 February 2003.

Dear Karl,

You may recall that we talked at dinner at the British Embassy at the end of January.

I am back in Washington from Monday and would love to come and talk to you if you have half an hour. I am writing constantly about the Iraq crisis and the US and have been asked to write a new book about it. I would very much value your advice.

I could send you my recent clips if you want – otherwise, Jennifer Millerwise in Dick Cheney's office has them all.

I do hope we can work something out.

Yours sincerely,

William