

**From:** "Torgerson, Karin B."  
**To:** "Hernandez, Israel", "Willeford, Emily", "Kavanaugh, Brett M.", "Vestewig, Lauren J."  
**Sent:** Wed, 18 Feb 2004 21:02:28 -0500  
[02-19 BP for Tax Permanence Mtg.doc](#)  
[02-19 BP for Dover AFB Mortuary Personnel photo op.doc](#)  
[02-19 BP for Dover AFB Mortuary Personnel.Unit2.doc](#)

Your finals for tomorrow. Thanks

## THE WHITE HOUSE

WASHINGTON

### MEETING WITH TAX FAMILIES AND REMARKS ON THE ECONOMY

Thursday, February 19, 2004  
2:45 p.m. – 3:25 p.m.  
Room 472 / Room 450  
Eisenhower Executive Office Building  
Karl Rove / Steve Friedman

#### I. PURPOSE

This event will focus on how families and small businesses have benefited from the tax relief that has been enacted over the past three years and the importance of making that relief permanent.

#### II. BACKGROUND

Today's meeting and remarks focus on the tax relief provisions that, unless made permanent, will impact families and small businesses in the next several years – the increased child credit; the marriage penalty relief; the ten percent tax bracket for families; the increased small business expensing for small businesses; and the death tax phase-out.

- For families, the increased child credit, marriage penalty relief, and expanded ten percent bracket will sunset after 2004, increasing the tax burden on a family of four earning \$40,000 by \$915 in 2005.
- For small businesses, allowable small business expensing will shrink from \$100,000 to just \$25,000 beginning in 2006, increasing the cost of capital investments for America's small businesses.
- Meanwhile, the death tax will come back in 2011 unless Congress acts. This creates uncertainty because people are making their estate plans now.

Today's meeting participants represent families and small businesses that will be harmed if Congress fails to make your tax relief permanent.

### III. PARTICIPANTS

#### Meeting Participants

Amy Cofer [CO-fur], stay-at-home mom

Katie Powers, Senior Staff Accountant, New Technology Management, Inc.

Shemetra [SHA-me-tra] Washington, Human Resource Administrator, New Technology Management, Inc.

Guy Donaldson, Fruit Grower

Rex Hammock, President, Hammock Publishing

Approximately 130 invited guests, including small business owners, employees, and association members

#### White House Staff

Brian Reardon, Special Assistant to the President for Economic Policy

Julie Thomas, Associate Director, Office of Public Liaison

### IV. PRESS PLAN

Open

### V. SEQUENCE OF EVENTS

- You proceed to Room 472 for a meeting with tax families.
- You conclude participation in the meeting and proceed to Room 450 for offstage announce.
- Meeting participants will be positioned to stand behind you for your remarks.
- You are announced on to stage and deliver remarks.
- Upon conclusion of your remarks, you greet guests and depart.

### VI. REMARKS

Talking Points provided by Speechwriting

### VII. ATTACHMENT

Talking Points

Background Information for Meeting Participants

## BACKGROUND INFORMATION FOR MEETING PARTICIPANTS

Amy Cofer [CO-fur], stay-at-home mom (Dumfries, Virginia)

- Amy is a stay-at-home mom and her husband, Joe, is a police officer for the United States Supreme Court.

b(6)

Katie Powers, Senior Staff Accountant, New Technology Management, Inc. (Gainesville, Virginia)

- Katie was hired as a staff accountant at New Technology Management in November 2003.
- She and her husband, David, have two children, Nicholas (5) and Allison (1).

b(6)

**Note:** Lurita Doan, President and CEO of New Technology Management participated in a conversation with you in January at the Department of Commerce.

Shemetra [SHA-me-tra] Washington, Human Resource Administrator, New Technology Management, Inc. (Falls Church, Virginia)

- Shemetra was hired to be a Human Resource Administrator for New Technology Management this month. She had been working as a temp for the company since December 2003.
- Shemetra is a single mom with two children, Raegan (7) and Lauryn (1).

b(6)

Guy Donaldson, Fruit Grower (Orrtanna, Pennsylvania)

- Guy owns and operates a 4<sup>th</sup> generation orchard with 225 acres.

b(6)

- Guy and his wife, Betty, have three children and seven grandchildren. All of his children (two sons and a daughter) are involved in managing the orchard.

b(6)

Rex Hammock, President, Hammock Publishing (Nashville, Tennessee)

b(6)

- Rex started Hammock Publishing 12 years ago. They are a custom publisher of magazines, newsletters, and on-line media for national associations and corporate clients.
- Rex and his wife, Ann, have two children, Ann Parker (16) and Knight (12).

b(6)

**THE WHITE HOUSE**

**WASHINGTON**

**PHOTO OPPORTUNITY WITH DOVER AIR FORCE BASE  
MORTUARY AFFAIRS UNIT STAFF**

Thursday, February 19, 2004

9:20 a.m. – 9:40 a.m.

Diplomatic Reception Room

Karl Rove

I. PURPOSE

To take a photo with the active-duty military, reservist, and Department of Defense staff responsible for receiving all casualties from the Operation Enduring Freedom and Operation Iraqi Freedom theaters, and to thank them for their service.

II. BACKGROUND

This is the first of two photo-ops today with members of the Dover Air Force Base Mortuary Affairs Unit.

There are 42 members of the Dover Air Force Base Mortuary Affairs Unit, including 22 reservists who will be released from active duty on February 24, 2004. The Mortuary Affairs Unit finalizes identification of casualties and prepares the remains for transfer to their families.

**Note:** The continuing case load prevents the entire unit from coming to the White House at once. You will take a photo with 19 members of the unit in the morning and with 20 members of the unit this afternoon (three people will be unable to attend due to conflicts).

III. PARTICIPANTS

b(3) 10 USC 130

b(3) 10 USC 130

White House Staff

Dr. Richard Tubb, Director, White House Medical Unit

Matt Smith, Associate Director, Office of Public Liaison

IV. PRESS PLAN

Closed

V. SEQUENCE OF EVENTS

- Guests are escorted to the Diplomatic Reception Room.
- You arrive, take group photo, and depart.

VI. REMARKS

None

**THE WHITE HOUSE**

**WASHINGTON**

**PHOTO OPPORTUNITY WITH DOVER AIR FORCE BASE  
MORTUARY AFFAIRS UNIT STAFF**

Thursday, February 19, 2004  
3:30 p.m. – 3:50 p.m.  
Vice President's Ceremonial Office  
Karl Rove

I. PURPOSE

To take a photo with the active-duty military, reservist, and Department of Defense staff responsible for receiving all casualties from the Operation Enduring Freedom and Operation Iraqi Freedom theaters, and to thank them for their service.

II. BACKGROUND

This is the second of two photo-ops today with members of the Dover Air Force Base Mortuary Affairs Unit.

There are 42 members of the Dover Air Force Base Mortuary Affairs Unit, including 22 reservists who will be released from active duty on February 24, 2004. The Mortuary Affairs unit finalizes identification of casualties and prepares the remains for transfer to their families.

**Note:** The continuing case load prevents the entire unit from coming to the White House at once. These 20 members are the remaining members of the unit you met this morning (three people were unable to attend due to conflicts).

III. PARTICIPANTS

b(3) 10 USC 130

b(3) 10 USC 130

White House Staff

Dr. Richard Tubb, Director, White House Medical Unit

Matt Smith, Associate Director, Office of Public Liaison

IV. PRESS PLAN

Closed

V. SEQUENCE OF EVENTS

- Guests are escorted to the Vice President's Ceremonial Office.
- You arrive, take group photo, and depart.

VI. REMARKS

None