

## Advocacy/Tax-Exempt Ethics



**Please return around Thanksgiving for the Comprehensive Training Module  
Meanwhile:**

1. There are four major categories of activities that can jeopardize your **tax-exempt status**:
  - A. Lobbying
  - B. Political Campaign Intervention
  - C. Activities generating excessive unrelated business income (UBI)
  - D. Private benefit/inurement
    - Some of these activities (B & D) are absolutely prohibited, while others (A & C) are restricted.
2. When dealing with **elected officials**, please observe the following:
  - A. Keep Lobbying efforts “light.”
    - Limit efforts to information only (AF Magazine & Daily Report access, Point Papers and verbal information relating issues of importance to the AF and SF).
    - Let AFA National do the heavy lobby-related lifting inside the Beltway.
  - B. While acting as part of the AFA, you cannot give or ask others to make campaign contributions to candidates for public office.
  - C. You can invite elected officials and staff to AFA meetings and even publicly thank them -- including inviting press -- for doing something that AFA requested. But remember, you cannot endorse or solicit.
  - D. If you are representing AFA National do not give an elected official or staff a gift.
    - A gift is anything of monetary value (a few exceptions apply).
    - Please contact William Castle, Vice President of Legislative Affairs, at [wcastle@afa.org](mailto:wcastle@afa.org) before offering a gift or extending an invitation to a Member of Congress or their staff.
  - E. Food: Region, State, and local Chapters and National AFA can serve food and drinks of “nominal value” if they do not constitute a meal.
    - Steer away from food typically served as part of a meal (e.g. pizza, hot dogs, or sandwiches)
    - If a Region, State, Chapter organization or National AFA wants to serve a meal or something more substantial it must be permitted by an exception to the Gift Ban Rule.
    - Again, check with [wcastle@afa.org](mailto:wcastle@afa.org) for clarification.