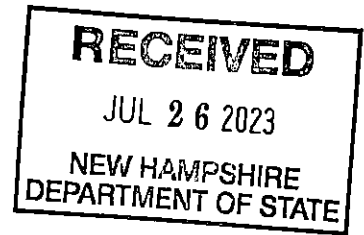




STATE OF NEW HAMPSHIRE
2023 Statement of Income and
Expenses for LOBBYISTS
(RSA Chapter 15)



PLEASE PRINT

I. Name of Lobbyist(s) Jim Merrill, Kathy Corey-Fox, Teresa Rosenberger

II. Name of lobbyist's partnership, firm or corporation, if any:

Bernstein Shur

(Name of partnership, firm or corporation)

670 N. Commercial St., Ste 108 P.O. Box 1120 Manchester NH 03105-1120
 Business Address: (Street) (Town/City) (State) (Zip Code)
 () (603) 623-8700 () (603) 623-7775 e-mail jim.merrill@bernsteinshur.com
 (Telephone) (Fax)

III. This statement covers: (Choose one – file separate reports for each client, OR you may file a separate report for reportable expense transactions which are not attributable to any one client).

All reportable transactions occurring in the months prior to the reporting date relative to the following client:

Waterford Research Institute, LLC

(Full Name of Client as it appears on the Lobbyist Registration Form)

OR

All reportable transactions by the lobbyist (including the lobbyist's family), or the lobbying firm listed below which are unrelated to any particular client.

IV. Date of Report April 26, 2023
Reports cover: activity from date of registration to 3/31/23
 October 25, 2023
activity from 7/1/23 to 9/30/23

July 26, 2023
activity from 4/1/23 to 6/30/23
 January 31, 2024
activity from 10/1/23 to 12/31/23

V. There have been no fees received and no reportable transactions made since the last report.
If this box is checked, complete just this form and submit it to the Secretary of State's Office, 107 North Main Street, State House, Room 204, Concord, NH 03301.

VI. Check if additional reports are attached:

- If you have received fees or made expenditures, you must file **Addendum A– Fees and Expenses**
- If you have paid an honorarium or reimbursed expenses, you must file **Addendum B– Report of Honorariums or Expense Reimbursement**
- If you, your firm, or your family has made political contributions, you must file **Addendum C– Political Contributions**

Sworn Statement/Affirmation by Lobbyist

I have read RSA 15, RSA 15-B, RSA 14-C and RSA 664 and hereby swear or affirm that the foregoing information is true and complete to the best of my knowledge and belief.

(Signature of lobbyist)

Jim Merrill

(Print Name of lobbyist)

7/26/2023

(Date)



STATE OF NEW HAMPSHIRE

Lobbyists Fees and Expenses
Addendum A

(RSA Chapter 15:6)

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I. Name of Lobbyist(s) Jim Merrill, Kathy Corey-Fox, Teresa Rosenberger

II. Name of lobbyist's partnership, firm or corporation, if any:

Bernstein Shur

(Name of partnership, firm or corporation)

III. Name of Client Waterford Research Institute, LLC Date 7/25/2023

IV. Fees Received

Indicate the gross amount of all fees received from the client identified above that are related, directly or indirectly, to lobbying, including fees for services such as public advocacy, government relations, or public relations services including research, monitoring legislation, and related legal work. The gross fee amount reported shall not be reduced by any expenses:

- a) Total of all fees received in this reporting period a) \$ 16,150.00
b) Total of all fees received this calendar year, prior to this reporting period b) \$ 8,000.00
c) Total of all fees received to date c) \$ 24,150.00
d) Indicate the amount of any such fees that are due, but have not yet been paid d) \$ 8,000.00

V. Expenses:

Lobbyist(s)/Lobbying partnerships, firms, or corporations are required to report all expenses made from lobbying fees. Separate reports are to be filed for expenditures made relative to each client and if expenditures are made by the lobbyist(s)/firm that are unrelated to any one client a separate report may be filed for the lobbyist(s)/firm. Expenses are to be reported in one of three categories of expenses: (a) the aggregate total of all expenses paid during the reporting period for salaries, benefits, support staff, and office expenses; (b) the aggregate total of all individual expenses where the expenditure was of \$25.00 or less (for example: meals purchased during a business lunch where the cost was \$25.00 or less, purchase of a pen with a value of less than \$10 that is given to the person being lobbied, purchase of a ceremonial object given to a person being lobbied with a value of \$25.00 or less); and (c) an itemized statement of each individual expenditure made during this reporting period of greater than \$25.00 for any purpose not covered by (a) (for example: purchase of a meal with value of greater than \$25, purchase of a ceremonial object to be given to the subject of lobbying with a value greater than \$25, but not greater than \$50, restaurant expenses for a legislative reception). Expenses for honorariums, expense reimbursement, or political contributions will be reported on separate addendums and should not be reported on Addendum A.

- a) Total aggregate expenses for this reporting period for salaries, benefits, support staff, and office expenses, related directly or indirectly to lobbying. a) \$ 16,150.00 (see attached)
b) Total aggregate of expenditures during this reporting period, not reported in a), of \$25 or less. b) \$ 0.00
c) Total of all itemized expenditures reported in detail in section VI. c) \$ 0.00

d) Total expenses for this reporting period
(Add lines a, b and c)

d) \$ 16,150.00

e) Total of expenses paid this calendar year, prior to this reporting period
(This should be the amount on line f of addendum A for last month's report)

e) \$ 8,000.00

f) Total of all expenses year to date

f) \$ 24,150.00

VI. Other Expenses:

Provide the following detail for all expenditures of more than \$25 made from lobbying fees during this reporting period, including by whom paid or to whom charged.

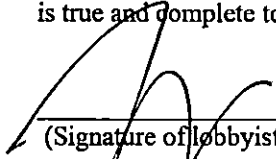
Paid to:

Amount:

| | |
|-------|----------|
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |

Sworn Statement/Affirmation by Lobbyist

I have read RSA 15, RSA 15-B and RSA 664 and hereby swear or affirm that the foregoing information is true and complete to the best of my knowledge and belief.



(Signature of lobbyist)

7/26/2023
(Date)

Jim Merrill

(Print Name of lobbyist)

*Attachment to Addendum A, Section V

The Bernstein Shur Group is a subsidiary business of the Bernstein Shur law firm, with offices in Maine, New Hampshire and Vermont. The Group's lobbying work is only one part of a broad range of work, and the consultants involved in lobbying also perform other consulting work which is completely unrelated to lobbying. All fees for services and reimbursable expenses paid by Bernstein Shur Group clients (including lobbying clients) are deposited into the . operating revenues of the Group and/or law firm. All operating expenses of the Group are paid from operating expenses of the Group and/or law firm. Accordingly, it is impossible to determine with any more specificity how funds placed into our general operating account were later used.



STATE OF NEW HAMPSHIRE

Lobbyists Report of
Political Contributions
Addendum C
(RSA Chapter 15:6)

P I. Name of Lobbyist(s) Kathy Corey-Fox

L II. Name of lobbyist's partnership, firm or corporation, if any:
A Bernstein Shur
S (Name of partnership, firm or corporation)

P III. Name of Client Waterford Research Date 7/26/2023

R Political Contributions
I For each political contribution that is reportable pursuant to RSA Chapter 664 paid on behalf of the
N client/lobbyist and lobbying firm, indicate the following:
T

Full name of candidate: Warmington Cinde
(Last Name) (First Name) (Middle Name/Initial)
Amount of contribution \$ 125.00 Office Candidate is Seeking Executive Council

If the contribution is an in-kind contribution, provide a description of the goods or services provided, and enter the actual cost of the in-kind contribution on the line above for amount of contribution. If the actual cost is not known, enter an estimated value and the word "estimate."

Full name of candidate: Carson Sharon
(Last Name) (First Name) (Middle Name/Initial)
Amount of contribution \$ 200.00 Office Candidate is Seeking State Senate

If the contribution is an in-kind contribution, provide a description of the goods or services provided, and enter the actual cost of the in-kind contribution on the line above for amount of contribution. If the actual cost is not known, enter an estimated value and the word "estimate."

Full name of candidate: Bradley Jeb
(Last Name) (First Name) (Middle Name/Initial)
Amount of contribution \$ 250.00 Office Candidate is Seeking State Senate



STATE OF NEW HAMPSHIRE

Lobbyists Report of Political Contributions Addendum C (RSA Chapter 15:6)

P I. Name of Lobbyist(s) Kathy Corey-Fox

L II. Name of lobbyist's partnership, firm or corporation, if any:

E Bernstein Shur (Name of partnership, firm or corporation)

A III. Name of Client Waterford Research Date 7/26/2023

S Political Contributions For each political contribution that is reportable pursuant to RSA Chapter 664 paid on behalf of the client/lobbyist and lobbying firm, indicate the following:

Full name of candidate: NH Senate Democratic Caucus (Last Name) (First Name) (Middle Name/Initial) Amount of contribution \$ 250.00 Office Candidate is Seeking Not applicable

If the contribution is an in-kind contribution, provide a description of the goods or services provided, and enter the actual cost of the in-kind contribution on the line above for amount of contribution. If the actual cost is not known, enter an estimated value and the word "estimate."

Full name of candidate: NH Senate Republican PAC (Last Name) (First Name) (Middle Name/Initial) Amount of contribution \$ 150.00 Office Candidate is Seeking Not applicable

If the contribution is an in-kind contribution, provide a description of the goods or services provided, and enter the actual cost of the in-kind contribution on the line above for amount of contribution. If the actual cost is not known, enter an estimated value and the word "estimate."

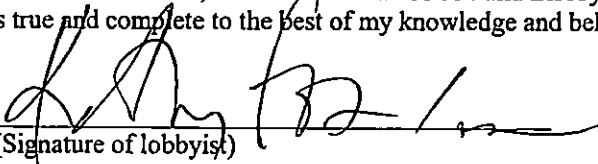
Full name of candidate: (Last Name) (First Name) (Middle Name/Initial) Amount of contribution \$ Office Candidate is Seeking

If the contribution is an in-kind contribution, provide a description of the goods or services provided, and enter the actual cost of the in-kind contribution on the line above for amount of contribution. If the actual cost is not known, enter an estimated value and the word "estimate."

(If more than three contributions were made, report additional contributions on separate addendum C forms.)

Sworn Statement/Affirmation by Lobbyist

I have read RSA 15, RSA 15-B and RSA 664 and hereby swear or affirm that the foregoing information is true and complete to the best of my knowledge and belief.


(Signature of lobbyist)

7/26/2023

(Date)

Kathy Corey-Fox

(Print Name of lobbyist)