



# Shelby County Republican Party

## Candidate Packet Contents 2012 Republican Primary Election

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# Shelby County Republican Party

November 14, 2011

Dear Candidate:

The 2012 Election is here and will prove to be quite an exciting year for Republicans in Alabama and, as always, here in Shelby County.

Thank you for your interest in running as a candidate in the Republican Primary and for your dedication to the Shelby County Republican Party. Enclosed in this packet you will find the necessary qualification forms to submit to the Shelby County Republican Party, the Shelby County Probate Judge and the State of Alabama Ethics Commission.

Please consult your legal counsel to ensure all forms, where applicable, are correctly filled out and submitted to the proper organizations before the candidate filing deadline of 5:00 pm January 13, 2012 to avoid disqualification. We advise you maintain contact with the office of the Probate Judge and the Ethics Commission to make sure they have received all necessary forms and information.

With the new campaign finance and ethics laws passed and put into effect during the 2011 legislative session, there are numerous changes to the reporting requirements that affect you as a candidate, and I urge you to familiarize yourself thoroughly with the material provide to you in your packets.

Should you have questions or require assistance, please contact only the Shelby County Republican Party representatives listed on the attached instruction sheet. We look forward to working with you toward victory in 2012.

Sincerely,

A handwritten signature in black ink, appearing to read "Freddy Ard", with a long horizontal flourish extending to the right.

Freddy Ard

Freddy Ard, Chairman  
1920 Valleydale Road • Suite 154 • Hoover, Alabama 35244  
(205) 994-6497      [www.shelbycountygop.org](http://www.shelbycountygop.org)



# Shelby County Republican Party

## CANDIDATE FILING INSTRUCTIONS- 2012 REPUBLICAN PRIMARY

1. Check to make sure all forms and information are included in this packet
2. Read thoroughly all the qualifying materials, carefully heeding all instructions therein.
3. (A) Complete the Declaration of Candidacy form, carefully following instructions therein, and (B) make check for qualifying fee (see Schedule of Qualifying Fees) payable to SHELBY COUNTY REPUBLICAN PARTY.
4. Present completed qualifying form, along with payment of qualifying fee, in person, and by appointment, to one of the following officials (DO NOT MAIL):

Freddy Ard  
Chairman  
(205) 821-5916

Andrew Plaster  
Secretary  
(205) 368-7249

Qualifying opens on Monday, November 14, 2011, and closes at 5:00pm(CST) on Friday, January 13, 2012. The Chairman and/or Secretary will be available to receive qualifying forms at the office of the Judge of Probate in the Shelby County Courthouse between 3:00pm (CST) and 5:00pm (CST) on the date of qualifying deadline.

5. Complete and return via certified mail the Statement of Economic Interests form to both the Alabama Ethics Commission AND SCGOP Headquarters simultaneous with the date of becoming a candidate as defined in Alabama Code Section 17-5-2 or within 5 days of submitting qualifying papers (whichever comes first).
6. Complete and return Appointment of Principle Campaign Committee form to the Shelby County Probate office within five calendar days of qualifying with the County Party as defined in Alabama Code Section 17-5-2.
7. Confer with legal counsel to ensure correct compliance with all election laws.
8. Be aware of all pre-election report deadlines and submit financial reports to your county Probate office as required once fundraising thresholds have been met (see Candidate Filing Guide for details).
9. Upon dissolution of the campaign committee, the chairman or treasurer of the committee should provide the Secretary of State's office with a Statement of Dissolution Form, a record of unreported contributions and expenditures, and a statement of how excess campaign funds will be distributed.

**The qualifying deadline for ALL candidates is 5:00pm January 13, 2012.**

Freddy Ard, Chairman  
1920 Valleydale Road • Suite 154 • Hoover, Alabama 35244  
(205) 994-6497                      [www.shelbycountygop.org](http://www.shelbycountygop.org)

# Shelby County Republican Party

## Schedule of Qualifying Fees

### 2012 Republican Primary Election

OFFICE ON BALLOT 2012 REPUBLICAN PRIMARY ELECTION				ANNUAL COMPENSATION		QUALIFYING FEE
JURISDICTION	NOTE	OFFICE	DISTRICT/ PLACE	SALARY	FIXED EXPENSE	
18th Judicial Circuit	*	Circuit Judge	Place 2	\$ 119,849		<b>\$2,396.97</b>
18th Judicial Circuit	*	Circuit Judge	Place 3	\$ 119,849		<b>\$2,396.97</b>
18th Judicial Circuit	*	Circuit Clerk		\$ 69,097		<b>\$1,381.95</b>
Shelby County		Judge of Probate		\$ 118,297		<b>\$2,365.94</b>
Shelby County		County Commissioner	District 1	\$ 20,614	\$ 7,200	<b>\$556.28</b>
Shelby County		County Commissioner	District 2	\$ 20,614	\$ 7,200	<b>\$556.28</b>
Shelby County		County Commissioner	District 3	\$ 20,614	\$ 7,200	<b>\$556.28</b>
Shelby County		County Commissioner	District 4	\$ 20,614	\$ 7,200	<b>\$556.28</b>
Shelby County		County Commissioner	District 5	\$ 20,614	\$ 7,200	<b>\$556.28</b>
Shelby County		County Commissioner	District 6	\$ 20,614	\$ 7,200	<b>\$556.28</b>
Shelby County		County Commissioner	District 7	\$ 20,614	\$ 7,200	<b>\$556.28</b>
Shelby County		County Commissioner	District 8	\$ 20,614	\$ 7,200	<b>\$556.28</b>
Shelby County		County Commissioner	District 9	\$ 20,614	\$ 7,200	<b>\$556.28</b>
Shelby County		Board of Education	Place 1	\$ 9,600		<b>\$192.00</b>
Shelby County		Board of Education	Place 2	\$ 9,600		<b>\$192.00</b>

**Candidates make checks in the amount of QUALIFYING FEE payable to:  
Shelby County Republican Party**

*\* Files with Alabama Republican Party, with check for 50% of qualifying fee payable to Shelby County Republican Party.*





# Candidate Filing Guidelines

## Fair Campaign Practices Act ♦ Election 2012

Elections Division ♦ Office of the Secretary of State ♦ State of Alabama

Beth Chapman, Secretary of State

### BECOMING A CANDIDATE FOR STATE, COUNTY, OR MUNICIPAL OFFICE FOR PURPOSES OF THE FCPA

The Fair Campaign Practices Act (FCPA) defines a candidate as a person who has:

- 1. Qualified to be listed on an election ballot** by filing qualification forms with a political party or by submitting a petition to run as an independent or third-party candidate; or
- 2. Received contributions or made expenditures for an election campaign equal to the following thresholds:**
  - ▶ \$25,000 or more for statewide office
  - ▶ \$ 5,000 or more for circuit or district office
  - ▶ \$10,000 or more for State Senate
  - ▶ \$ 5,000 or more for State House of Representatives
  - ▶ \$ 1,000 or more for municipal or county office

### APPOINTING A PRINCIPAL CAMPAIGN COMMITTEE

Within **five (5) days** of becoming a candidate, one must file an **Appointment of Principal Campaign Committee Form** with the secretary of state, if seeking election to a statewide, circuit, or district office, or with the local probate judge, if seeking election to a municipal or county office.

This form establishes the candidate's finance committee. A candidate may either serve as his or her own committee or may appoint a committee of two to five persons. This committee must report until dissolved.

### FILING REPORTS

After exceeding the threshold amount in either contributions or expenditures, a candidate is required to file disclosure reports at specific times. If the filing threshold has not been exceeded, the candidate is not required to file disclosure reports. Failure to comply with FCPA reporting requirements may result in forfeiture of the election by the candidate and may result in a criminal conviction if prosecuted.

#### PRE-ELECTION REPORTS

Beginning 12 months out from an election, campaign finance disclosure reports

are required once a candidate meets the filing threshold for the office to which he or she is seeking election. These reports must be filed at the following times:

- ▶ the last day of every month beginning 12 months before any election for which the committee receives contributions or makes expenditures with a view toward influencing the election.
- ▶ each Friday beginning the month prior to the election
- ▶ on any one day, beginning 8 days before the election when the committee receives or spends funds in excess of \$5,000 on that day for any legislative, state school board or other statewide election.
- ▶ when a candidate receives a single contribution of \$20,000 or more, a report is due within two business days of the date of the receipt of the contribution if it is not included in a monthly, weekly or daily report.

On the summary page, the report should include the amount of cash on hand at the beginning of the reporting period, a total of all contributions and expenditures made during the reporting period, and the ending balance. Contributions and expenditures over \$100 that have been received or expended during the reporting period should be itemized on the following pages of the report.

#### ANNUAL REPORT

An *Annual Report* is required during both election and non-election years. This report may be filed after January 1 and must be filed no later than January 31.

**All candidates who have not dissolved their principal campaign committee and all state, county and municipal elected officials must file this report.**

The summary page for the annual report includes two sections:

#### ▶ Section I

Similar to a pre-election report, the candidate uses this section to report any activity since his or her last filing. The beginning balance is the ending balance from the last report filed. Forms 2 through 5 are used to itemize any contributions and expenditures that have not previously been reported.

#### ▶ Section II

In this section, the candidate reports the total contributions and expenditures for the calendar year. The beginning balance is the ending balance from the last annual report filed.

## REPORTS FOR ELECTIONEERING COMMUNICATIONS NEW FOR 2012

Candidates who expend more than \$1,000 on an "**electioneering communication**" are required to file disclosure reports. The reports must identify the source or sources of the funds used for the electioneering communication and the recipients of expenditures related to the electioneering communication [*Act of Alabama 2011-697*].

This reporting is required even if the candidate has not yet reached the filing threshold for the office sought by the candidate. However, the candidate is not required to duplicate any reporting. For more information, consult *Campaign Advertising Guidelines*, a document available from the Secretary of State's Elections Division.

## RAISING MONEY

Candidates may begin fund raising 12 months prior to the election. They may continue fund raising for 120 days after the election to pay off campaign debts but only to the extent of any campaign debt and only for debts that are directly related to lawful campaign expenditures.

The FCPA prohibits candidates from receiving contributions from other principal campaign committees. However, principal campaign committees are allowed to transfer money from one principal campaign committee to another if the two principal campaign committees are for the same person [*§17-5-15(b)*].

**State** candidates cannot solicit or receive contributions any time the Alabama Legislature is in session, unless the Legislature is in session within 120 days of an election. Candidates should note, however, that this prohibition does not apply to loans they may make to their own campaign committee. Fundraising by candidates for county and municipal is not affected by legislative sessions.

## DISSOLVING A PRINCIPAL CAMPAIGN COMMITTEE

The chairman or treasurer of the campaign committee should submit a **Statement of Dissolution Form** to the secretary of state or local probate judge to dissolve a committee. The **Statement of Dissolution** must be accompanied by a final report detailing contributions and expenditures not previously reported and stating how excess funds will be distributed.

## USE OF CAMPAIGN FUNDS

Candidates may use their campaign funds only as follows [*§17-5-7(a)*]:

- ▶ For necessary and ordinary expenditures of the campaign.
- ▶ For expenditures that are reasonably related to performing the duties of the office held. Expenditures that are reasonably related to performing the duties

of the office held do not include personal and legislative living expenses, as defined in this chapter.

- ▶ For donations to the State General Fund, the Education Trust Fund, or equivalent county or municipal funds. Donations to an organization to which a federal income tax deduction is permitted under subparagraph (A) of paragraph (1) of subsection (b) of Section 170 of the Internal Revenue Code of 1986, as amended, or any other charitable, educational, or eleemosynary cause of Section 501 of Title 26 of the U. S. Code.
- ▶ For inaugural or transitional expenses.

The FCPA prohibits candidates from giving contributions to [*§17-5-15(b)*]:

- ▶ Political action committees
- ▶ 527 organizations
- ▶ Private foundations
- ▶ Principal campaign committees

Principal campaign committees are allowed to transfer from one principal campaign committee to another if the two principal campaign committees are for the same person [*§17-5-15(b)*].

## STATEMENT OF ECONOMIC INTERESTS

All candidates are required by the state ethics law (§36-25-14, *Code of Alabama*, 1975) to file a *Statement of Economic Interests* with the appropriate election official at the same time they become a candidate. For more information on this requirement, contact the State Ethics Commission, P.O. Box 4840, Montgomery, AL 36103-4840, (334) 242-2997.

## FEDERAL CANDIDATES

Candidates for federal office must comply with federal laws administered by the Federal Elections Commission. The FEC can be reached by phone at 1-800-424-9530. The FEC web site is [www.fec.gov](http://www.fec.gov).

## JUDICIAL CANDIDATES

Judicial candidates are required by Canon 6C of the **Canons of Judicial Ethics** to make some additional filings with the clerk of the Alabama Supreme Court.

## DISCLAIMER

This document is not a substitute for the *Code of Alabama*, 1975, as amended. This document is provided as a guide and is not intended to be an authoritative statement of law. For further legal information, please consult the *Code of Alabama*, 1975, as amended, or other appropriate legal resources.



# Campaign Advertising Guidelines

## Fair Campaign Practices Act ♦ Election 2012

Elections Division ♦ Office of the Secretary of State ♦ State of Alabama

Beth Chapman, Secretary of State

### ELECTIONEERING COMMUNICATION

The Fair Campaign Practices Act (FCPA) defines “**election communication**” as any communication disseminated through any federally regulated broadcast media, any mailing, or other distribution, electronic communication, phone bank, or publication which

- (i) contains the name or image of a candidate;
- (ii) is made within 120 days of an election in which the candidate will appear on the ballot;
- (iii) the only reasonable conclusion to be drawn from the presentation and content of the communication is that it is intended to influence the outcome of an election; and
- (iv) entails an expenditure in excess of one thousand dollars (\$1,000).

### IDENTIFICATION OF RESPONSIBLE PARTY

The Fair Campaign Practices Act (FCPA) specifies that a political advertisement or electioneering communication appearing in print and broadcast in any electronic media must clearly identify the entity responsible for paying for the advertisement or electioneering communication.

Any printed campaign literature, political advertisement or electioneering communication must contain a clear and unmistakable identification of the entity responsible for directly paying for the advertisement or electioneering communication.

Any political advertisement or electioneering communication appearing in broadcast media must contain a statement that the communication is a paid advertisement and must clearly identify the entity directly responsible for paying for the advertisement. These statements must appear at the beginning, during, or end of a radio or television spot.

### EXCEPTIONS TO IDENTIFICATION REQUIREMENTS

The requirement to identify the entity responsible for paying for a campaign advertisement or electioneering communication does not apply to any political advertisement or electioneering communication used by a candidate and the candidate's supporters or

by a political committee if the message or advertisement is:

- ▶ Designed to be worn by a person.
- ▶ Placed as a paid link on an Internet website, provided the message or advertisement is no more than 200 characters in length and the link directs the user to another Internet website that complies with the identification requirements.
- ▶ Placed as a graphic or picture link where compliance with the requirements of this section is not reasonably practical due to the size of the graphic or picture link and the link directs the user to another Internet website that complies with the identification requirements.
- ▶ Placed at no cost on an Internet website for which there is no cost to post content for public users.
- ▶ Placed or distributed on an unpaid profile account which is available to the public without charge or on a social networking Internet website, as long as the source of the message or advertisement is patently clear from the content or format of the message or advertisement. A candidate or political committee may prominently display a statement indicating that the website or account is an official website or account of the candidate or political committee and is approved by the candidate or political committee. A website or account may not be marked as official without prior approval by the candidate or political committee.
- ▶ Distributed as a text message or other message via Short Message Service, provided the message is no more than 200 characters in length or requires the recipient to sign up or opt in to receive it.
- ▶ Connected with or included in any software application or accompanying function, provided that the user signs up, opts in, downloads, or otherwise accesses the application from or through a website that complies with the identification requirements.
- ▶ Sent by a third-party user from or through a campaign or committee's website, provided the website complies with the identification requirements.
- ▶ Contained in or distributed through any other technology related item, service, or device for which compliance with subdivision (1) is not reasonably practical due to the size or nature of such item, service, or device as available, or the means of displaying the message or advertisement makes compliance with the identification requirements impracticable.

## DOES THE FCPA SPECIFY WORDING FOR THE IDENTIFICATION STATEMENT?

No, the law does not give a specific format for wording the disclaimer. However, the FCPA does state that political advertisements must be identified or marked as a paid advertisement. Such words as *paid advertisement by*, *paid for by*, *paid political ad* meet the requirements of the act; however, an advertiser is not limited to just those phrases. Attorney General's Opinion 94-227 states that *words which indicate that the advertisement is a paid political advertisement meet the requirements of the law*.

In addition, the disclaimer must contain the identification of the person, candidate, principal campaign committee, or other entity placing the ad or distributing the electioneering communication. Under the FCPA, the term **identification means full name and complete address**. The attorney general has stated in AG's Opinion 94-227 that a complete address includes the street or post office box, city, and state.

## DOES THE U.S. SUPREME COURT RULING IN MCINTRYE V. OHIO ELECTIONS COMMISSION AFFECT FCPA DISCLAIMER REQUIREMENTS?

That case, which involved an individual who distributed anonymous leaflets opposing a proposed school tax levy, has a very limited impact. Alabama's attorney general has written in AG's Opinion 95-218 that the ruling *is limited to individuals who distribute anonymous written material* (particularly leaflets) *in a non-candidate election*. In all other circumstances, the advertising must carry identification.

## IS THERE A PENALTY FOR FAILING TO COMPLY?

The attorney general may prosecute any person who violates the FCPA law. Anyone failing to comply with the advertising requirements would be guilty of a Class A misdemeanor and subject to a fine of not more than \$2,000 and/or imprisonment of not more than one year.

## DISCLOSURE REQUIREMENTS FOR ELECTIONEERING COMMUNICATIONS

Any person, principal campaign committee, political action committee, non-profit organization, or other entity paying for an electioneering communication must disclose the contributions received for funding the electioneering communication and to whom payments are made related to the electioneering communication.

This disclosure of these contributions and expenditures is to be made on the same forms and at the time times as required of political action committees.

## EXEMPTIONS FROM DISCLOSURE REQUIREMENTS

The following entities are exemption from the disclosure requirements for electioneering communications:

- ▶ Churches, unless the church's expenditures are used to influence the outcome of an election. Nothing herein shall require a church to disclose the identities, donations, or contributions of members of the church. As used in FCPA, the term "church" is defined in accordance with and recognized by Internal Revenue Service guidelines and regulations.
- ▶ Any membership or trade organization, when using an electioneering communication to communicate with or inform its members, its members' families, or its members' employees.

## CORPORATE CONTRIBUTION LIMITS

The corporate contribution limits contained in §§10A-21-1.02, 10A-21-1.03, and 10A-21-1.04 of the Code of Alabama shall not apply in any respect to an electioneering communication.

## HAVE QUESTIONS? CONTACT . . .

**By email:** [alavoter@vote.alabama.gov](mailto:alavoter@vote.alabama.gov)

**By telephone:** 1-800-274-VOTE (8683)  
(334) 242-7210

**By mail:** Elections Division  
Office of Secretary of State  
P.O. Box 5616  
Montgomery, Alabama 36103-5616

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# FCPA Filing Calendar - 2012 Election Cycle

Presidential Preference Primary Election  
 Statewide Primary Election  
 Primary Runoff Election  
 General Election

Tuesday, March 13, 2012  
 Tuesday, March 13, 2012  
 Tuesday, April 24, 2012  
 Tuesday, November 6, 2012

<p>Purple lines indicate deadlines involving monthly reports. Monthly reports are due on the last day of each month beginning 12 months prior to the election date.</p>
<p>Blue lines indicate deadlines involving weekly reports. Weekly reports are due on the Friday of each week beginning on the month prior to the election date.</p>
<p>Red lines indicate deadlines involving daily reports. Beginning on the 8th day prior to the election, daily reports are due for principal campaign committees and PACs that receive or spend \$5,000 or more on any day with a view toward influencing the election. Once a principal campaign committee or PAC meets this daily amount, it must file daily reports up until the election date. <u>This does not apply to elections involving county and city offices.</u></p>
<p>Principal campaign committees and PACs must file a report disclosing the receipt of any single contribution of \$20,000 or more within two (2) business days of receiving the contribution <u>if</u> the contribution has not already been reported in a finance disclosure report.</p>

Date	Activity
March 13, 2011	Candidates intending to participate in the 2012 primary election may begin soliciting and accepting contributions
September 28, 2011	Deadline to close books for the monthly report for the primary election
September 28, 2011	Certified mail deadline for the monthly report for the primary election
<b>September 30, 2011</b>	<b>Deadline to file the monthly report for the primary election</b>
October 29, 2011	Deadline to close books for the monthly report for the primary election
October 29, 2011	Certified mail deadline for the monthly report for the primary election
<b>October 31, 2011</b>	<b>Deadline to file the monthly report for the primary election</b>
November 6, 2011	Candidates intending to participate in the 2012 general election, but not in the primary election, may begin soliciting and accepting contributions
November 14, 2011	Electioneering communication for the primary election is defined as any communication disseminated through any federally regulated broadcast media, any mailing, or the distribution, electronic communication, phone bank, or publication containing (1) the name or image of a candidate; (2) is made within 120 days of an election in which the candidate will appear on the ballot; (3) the only reasonable conclusion to be drawn from the presentation and content of the communication is that it is intended to influence the outcome of an election; and (4) entails an expenditure in excess of one thousand dollars (\$1,000).
November 28, 2011	Deadline to close books for the monthly report for the primary election
November 28, 2011	Certified mail deadline for the monthly report for the primary election
<b>November 30, 2011</b>	<b>Deadline to file the monthly report for the primary election</b>

<b>December 26, 2011</b>	<b>State Holiday (Christmas)</b>
December 31, 2011	Deadline to close books for the monthly pre-election report for the primary election
December 31, 2011	Certified mail deadline for the monthly pre-election report for the primary election
<b>January 2, 2012</b>	<b>State Holiday (New Year's)</b>
<b>January 3, 2012</b>	<b>Deadline to file the monthly report for the primary election</b>
January 13, 2012	Last day candidates may qualify with political parties to participate in primary election
January 27, 2012	Certified mail deadline for the annual report
January 27, 2012	Certified mail deadline for the monthly report for the primary election
January 28, 2012	Deadline to close books for the monthly report for the primary election (falls on a Sunday)
<b>January 31, 2012</b>	<b>Deadline for candidates and political committees to file annual report</b>
<b>January 31, 2012</b>	<b>Deadline to file the monthly report for the primary election</b>
February 1, 2012	Deadline to close books for the weekly report for the primary election
February 1, 2012	Certified mail deadline for the weekly report for the primary election
<b>February 3, 2012</b>	<b>Deadline to file the weekly report for the primary election</b>
February 7, 2012	Regular legislative session begins.
February 8, 2012	Deadline to close books for the weekly report for the primary election
February 8, 2012	Certified mail deadline for the weekly report for the primary election
<b>February 10, 2012</b>	<b>Deadline to file the weekly report for the primary election</b>
February 15, 2012	Deadline to close books for the weekly report for the primary election
February 15, 2012	Certified mail deadline for the weekly report for the primary election
<b>February 17, 2012</b>	<b>Deadline to file the weekly report for the primary election</b>
February 22, 2012	Deadline to close books for the weekly report for the primary election
February 22, 2012	Certified mail deadline for the weekly report for the primary election
<b>February 24, 2012</b>	<b>Deadline to file the weekly report for the primary election</b>
February 27, 2012	Deadline to close books for the monthly report for the primary election
February 27, 2012	Certified mail deadline for the monthly report for the primary election
<b>February 28, 2012</b>	<b>Mardi Gras - Observed in Baldwin &amp; Mobile County</b>
<b>February 29, 2012</b>	<b>Deadline to file the monthly report for the primary election</b>
February 29, 2012	Deadline to close books for the weekly report for the primary election
February 29, 2012	Certified mail deadline for the weekly report for the primary election

<b>March 2, 2012</b>	<b>Deadline to file the weekly report for the primary election</b>
March 2, 2012	Last day to register to vote for the primary election
<b>March 5, 2012</b>	<b>Daily report due . Please refer to the instructions on the top of the calendar page. ( <u>Does not apply to county and city offices</u> )</b>
<b>March 6, 2012</b>	<b>Daily report due . Please refer to the instructions on the top of the calendar page. ( <u>Does not apply to county and city offices</u> )</b>
<b>March 7, 2012</b>	<b>Daily report due . Please refer to the instructions on the top of the calendar page. ( <u>Does not apply to county and city offices</u> )</b>
March 7, 2012	Deadline to close books for the weekly report for the primary election
March 7, 2012	Certified mail deadline for the weekly report for the primary election
<b>March 8, 2012</b>	<b>Daily report due . Please refer to the instructions on the top of the calendar page. ( <u>Does not apply to county and city offices</u> )</b>
<b>March 9, 2012</b>	<b>Daily report due . Please refer to the instructions on the top of the calendar page. ( <u>Does not apply to county and city offices</u> )</b>
<b>March 9, 2012</b>	<b>Deadline to file the weekly pre-election report for the primary election</b>
<b>March 12, 2012</b>	<b>Daily report due . Please refer to the instructions on the top of the calendar page. ( <u>Does not apply to county and city offices</u> )</b>
<b>March 12, 2012</b>	<b>Pre-election report due for principal campaign committees and PACs receiving or spending an aggregate of \$5,000 or more on any day with a view towards influencing the election's result no later than 12:01 am on this day.</b>
<b>March 13, 2012</b>	<b>Primary Elections</b>
<b>March 14, 2011</b>	Deadline to close books for the weekly report for the primary election
March 14, 2012	Certified mail deadline for the weeklyreport for the primary runoff election
<b>March 16, 2012</b>	<b>Deadline to file the weekly report for the primary runoff election</b>
March 21, 2012	Deadline to close books for the weekly report for the primary election
March 21, 2012	Certified mail deadline for the weekly report for the primary runoff election
<b>March 23, 2012</b>	<b>Deadline to file the weekly report for the primary runoff election</b>
<b>March 28, 2012</b>	Deadline to close books for the weekly report for the primary election
March 28, 2012	Certified mail deadline for the weekly report for the primary runoff election
March 30, 2012	Deadline to file the weekly report for the primary runoff election
March 31, 2012	Deadline to close books for the monthly report for the primary election
March 31, 2012	Certified mail deadline for the monthly report for the primary runoff election
<b>April 2, 2012</b>	<b>Deadline to file the monthly report for the primary runoff election</b>

April 4, 2012	Deadline to close books for the weekly report for the primary election
April 4, 2012	Certified mail deadline for the weekly report for the primary runoff election
<b>April 6, 2012</b>	<b>Deadline to file the weekly report for the primary runoff election</b>
April 11, 2012	Deadline to close books for the weekly report for the primary election
April 11, 2012	Certified mail deadline for the weekly report for the primary runoff election
<b>April 13, 2012</b>	<b>Deadline to file the weekly report for the primary runoff election</b>
April 13, 2012	Last day to register to vote for the primary runoff election
<b>April 16, 2012</b>	<b>Daily report due . Please refer to the instructions on the top of the calendar page. ( Does not apply to county and city offices )</b>
<b>April 17, 2012</b>	<b>Daily report due . Please refer to the instructions on the top of the calendar page. ( Does not apply to county and city offices )</b>
<b>April 18, 2012</b>	<b>Daily report due . Please refer to the instructions on the top of the calendar page. ( Does not apply to county and city offices )</b>
April 18, 2012	Deadline to close books for the weekly report for the primary election
April 18, 2012	Certified mail deadline for the weekly report for the primary runoff election
<b>April 19, 2012</b>	<b>Daily report due . Please refer to the instructions on the top of the calendar page. ( Does not apply to county and city offices )</b>
<b>April 20, 2012</b>	<b>Pre-election report due for principal campaign committees and PACs receiving or spending an aggregate of \$5,000 or more on any day with a view towards influencing the election's result on the 4th day preceding the primary election. ( does not apply to county and city offices )</b>
April 20, 2012	Deadline to file the weekly report for the primary runoff election
<b>April 23, 2012</b>	<b>Daily report due . Please refer to the instructions on the top of the calendar page. ( Does not apply to county and city offices )</b>
<b>April 23, 2012</b>	<b>Pre-election report due for principal campaign committees and PACs receiving or spending an aggregate of \$5,000 or more on any day with a view towards influencing the election's result no later than 12:01 am on this day.</b>
<b>April 24, 2012</b>	<b>Primary Runoff Election</b>
April 28, 2012	Deadline to close books for the monthly report for the primary election
April 28, 2012	Certified mail deadline for the monthly report for the general election
<b>April 30, 2012</b>	<b>Deadline to file the monthly report for the general election</b>
<b>May 28, 2012</b>	<b>State Holiday</b>
May 29, 2012	Deadline to close books for the monthly report for the primary election
May 29, 2012	Certified mail deadline for the monthly report for the general election

<b>May 31, 2012</b>	<b>Deadline to file the monthly pre-election report for the general election</b>
<b>June 4, 2012</b>	<b>State Holiday ( Jefferson Davis' Birthday)</b>
June 30, 2012	Deadline to close books for the monthly report for the primary election
June 30, 2012	Certified mail deadline for the monthly report for the general election
<b>July 2, 2012</b>	<b>Deadline to file the monthly report for the general election</b>
<b>July 4, 2012</b>	<b>State Holiday - Independence Day</b>
July 9, 2012	Electioneering communication for the general election is defined as any communication disseminated through any federally regulated broadcast media, any mailing, or the distribution, electronic communication, phone bank, or publication containing (1) the name or image of a candidate; (2) is made within 120 days of an election in which the candidate will appear on the ballot; (3) the only reasonable conclusion to be drawn from the presentation and content of the communication is that it is intended to influence the outcome of an election; and (4) entails an expenditure in excess of one thousand dollars (\$1,000).
July 11, 2012	Last day candidates in primary election can accept contributions to retire a campaign debt
July 28, 2012	Deadline to close books for the monthly report for the primary election
July 28, 2012	Certified mail deadline for the monthly report for the general election
<b>July 31, 2012</b>	<b>Deadline to file the monthly report for the general election</b>
August 22, 2012	Last day candidates in primary runoff election can accept contributions to retire a campaign debt
August 29, 2012	Deadline to close books for the monthly report for the primary election
August 29, 2012	Certified mail deadline for the monthly report for the general election
<b>August 31, 2012</b>	<b>Deadline to file the monthly report for the general election</b>
<b>September 3, 2012</b>	<b>State Holiday (Labor Day)</b>
September 29, 2012	Deadline to close books for the monthly report for the primary election
September 29, 2012	Certified mail deadline for the monthly report for the general election
<b>October 1, 2012</b>	<b>Deadline to file the monthly report for the general election</b>
October 3, 2012	Deadline to close books for the weekly report for the primary election
October 3, 2012	Certified mail deadline for the weekly report for the general election
<b>October 5, 2012</b>	<b>Deadline to file the weekly report for the general election</b>
<b>October 8, 2012</b>	<b>State Holiday (Columbus Day)</b>
October 10, 2012	Deadline to close books for the weekly report for the primary election
October 10, 2012	Certified mail deadline for the weekly report for the general election

<b>October 12, 2012</b>	<b>Deadline to file the weekly report for the general election</b>
October 17, 2012	Deadline to close books for the weekly report for the primary election
October 17, 2012	Certified mail deadline for the weekly report for the general election
<b>October 19, 2012</b>	<b>Deadline to file the weekly report for the general election</b>
October 24, 2012	Deadline to close books for the weekly report for the primary election
October 24, 2012	Certified mail deadline for the weekly report for the general election
<b>October 26, 2012</b>	<b>Deadline to file the weekly report for the general election</b>
October 26, 2012	Last day to register to vote for general election
<b>October 29, 2012</b>	<b>Daily report due . Please refer to the instructions on the top of the calendar page. ( Does not apply to county and city offices )</b>
October 29, 2012	Deadline to close books for the monthly report for the primary election
October 29, 2012	Certified mail deadline for the monthly report for the general election
<b>October 30, 2012</b>	<b>Daily report due . Please refer to the instructions on the top of the calendar page. ( Does not apply to county and city offices )</b>
<b>October 31, 2012</b>	<b>Deadline to file the monthly report for the general election</b>
<b>October 31, 2012</b>	<b>Daily report due . Please refer to the instructions on the top of the calendar page. ( Does not apply to county and city offices )</b>
October 31, 2012	Deadline to close books for the weekly report for the primary election
October 31, 2012	Certified mail deadline for the weekly report for the general election
<b>November 1, 2012</b>	<b>Daily report due . Please refer to the instructions on the top of the calendar page. ( Does not apply to county and city offices )</b>
<b>November 2, 2012</b>	<b>Daily report due . Please refer to the instructions on the top of the calendar page. ( Does not apply to county and city offices )</b>
<b>November 2, 2012</b>	<b>Deadline to file the weekly report for the general election</b>
<b>November 5, 2012</b>	<b>Daily report due . Please refer to the instructions on the top of the calendar page. ( Does not apply to county and city offices )</b>
<b>November 5, 2012</b>	<b>Pre-election report due for principal campaign committees and PACs receiving or spending an aggregate of \$5,000 or more on any day with a view towards influencing the election's result no later than 12:01 am on this day.</b>
<b>November 6, 2012</b>	<b>General Election</b>
January 29, 2013	Certified mail deadline for annual report
<b>January 31, 2013</b>	<b>2011 annual report due (on or before January 31 of the succeeding year) next after general election</b>
March 6, 2013	Last day candidates in general election can accept contributions to retire a campaign debt

## **Section 17-5-2 – DEFINITIONS**

(a) For purposes of this chapter, the following terms shall have the following meanings:

(1) CANDIDATE. An individual who has done any of the following:

**a.** Taken the action necessary under the laws of the state to qualify himself or herself for nomination or for election to any state office or local office or in the case of an independent seeking ballot access, on the date when he or she files a petition with the judge of probate in the case of county offices, with the appropriate qualifying municipal official in the case of municipal offices, or the Secretary of State in all other cases.

**b.** Received contributions or made expenditures, or given his or her consent for any other person or persons to receive contributions or make expenditures, with a view to bringing about his or her nomination or election to any state office or local office. Notwithstanding the foregoing, no person shall be considered a candidate within the meaning of this subdivision until the time that he or she has either received contributions or made expenditures as provided herein in the following amounts:

1. Twenty-five thousand dollars (\$25,000) or more, with a view toward bringing about nomination or election to any state office other than one filled by election of the registered voters of any circuit or district within the state.

2. Five thousand dollars (\$5,000) or more, with a view toward bringing about nomination or election to any state office, excluding legislative office, filled by election of the registered voters of any circuit or district.

3. Ten thousand dollars (\$10,000) or more, with a view toward bringing about nomination or election to the AL Senate & five thousand dollars (\$5,000) or more, with a view toward bringing about nomination or election to the AL House of Representatives.

4. One thousand dollars (\$1,000) or more, with a view toward bringing about nomination or election to any local office.

(2) CONTRIBUTION. **a.** Any of the following shall be considered a contribution:

1. A gift, subscription, loan, advance, deposit of money or anything of value, a payment, a forgiveness of a loan, or payment of a third party, made for the purpose of influencing the result of an election.

2. A contract or agreement to make a gift, subscription, loan, advance, or deposit of money or anything of value for the purpose of influencing the result of an election.

3. Any transfer of anything of value received by a political committee from another political committee, political party, or other source

4. The payment of compensation by any person for the personal services or expenses of any other person if the services are rendered or expenses incurred on behalf of a candidate, political committee, or political party without payment of full and adequate compensation by the candidate, political committee, or political party. Provided, however, that the payment of compensation by a corporation for the purpose of establishing, administering, or soliciting voluntary contributions to a separate, segregated fund as permitted by Section 10-1-2, shall not constitute a contribution.

**b.** The term "contribution" does not include:

1. The value of services provided without compensation by individuals who volunteer a portion or all of their time on behalf of a candidate or political committee.

2. The use of real or personal property and the cost of invitations, food, or beverages, voluntarily provided by an individual to a candidate or political committee in rendering voluntary personal services on the individual's residential or business premises for election-related activities.

3. The sale of any food or beverage by a vendor for use in an election campaign at a charge to a candidate or political committee less than the normal comparable charge, if the charge to the political committee for use in an election campaign is at least equal to the cost of the food or beverage to the vendor.

4. Any unreimbursed payment for travel expenses made by an individual who, on his or her own behalf, volunteers personal services to a candidate or political committee.

5. The payment by a state or local committee of a political party of the cost of preparation, display, or mailing or other distribution incurred by the committee with respect to a printed slate card or sample ballot, or other printed listing of two or more candidates for any public office for which an election is held in the state, except that this subparagraph shall not apply in the case of costs incurred by the committee with respect to a display of the listing made on broadcasting stations, or in newspapers, magazines, or other similar types of general public political advertising.

6. The value or cost of polling data and voter preference data and information if provided to a candidate or political committee, unless the information was compiled with the advance knowledge of and approval of the candidate or the political committee.

(3) ELECTION. Unless otherwise specified, any general, special, primary, or runoff election, or any convention or caucus of a political party held to nominate a candidate, or any election at which a constitutional amendment or other proposition is submitted to the popular vote.

(4) EXPENDITURE. **a.** The following shall be considered expenditures:

1. A purchase, payment, distribution, loan, advance, deposit, or gift of money or anything of value made for the purpose of influencing the result of an election.

2. A contract or agreement to make any purchase, payment, distribution, loan, advance, deposit, or gift of money or anything of value, for the purpose of influencing the result of an election.

3. The transfer, gift, or contribution of funds of a political committee to another political committee.

**b.** The term "expenditure" does not include:

1. Any news story, commentary, or editorial prepared by and distributed through the facilities of any broadcasting station, newspaper, magazine, or other periodical publication, unless the facilities are owned or controlled by any political party or political committee.

2. Nonpartisan activity designed to encourage individuals to register to vote, or to vote.

3. Any communication by any membership organization to its members or by a corporation to its stockholders and employees if the membership organization or corporation is not organized primarily for the purpose of influencing the result of an election.

4. The use of real or personal property and the cost of invitations, food, or beverages, voluntarily provided by an individual in rendering voluntary personal services on the individual's residential or business premises for election-related activities.

5. Any unreimbursed payment for travel expenses made by an individual who, on his or her own behalf, volunteers personal services to a candidate or political committee.

6. Any communication by any person which is not made for the purposes of influencing the result of an election.

7. The payment by a state or local committee of a political party of the cost of preparation, display, or mailing or other distribution incurred by the committee with respect to a printed slate card or sample ballot, or other printed listing of two or more candidates for any public office for which an election is held in the state, except that this subparagraph shall not apply in the case of costs incurred by the committee with respect to a display of the listing made on broadcasting stations, or in newspapers, magazines, or other similar types of general public political advertising.

(5) IDENTIFICATION. The full name and complete address.

(6) LOAN. A transfer of money, property, or anything of value in consideration of a promise or obligation, conditional or not, to repay in whole or part.

(7) LOCAL OFFICE. Any office under the constitution & laws of the state, except circuit, district, or legislative offices, filled by election of the registered voters of a single county or municipality, or by voters of a division contained within a county or municipality

(8) PERSON. An individual, partnership, committee, association, corporation, labor org., or any other org. or group of persons.

(9) PERSONAL AND LEGISLATIVE LIVING EXPENSES. Household supplies, personal clothing, tuition payments, mortgage, rent, or utility payments for a personal residence; admission to an entertainment event or fees for a country club or social club, unless tied to a specific campaign event or functions involving constituents; and any other expense, excluding food and beverages, that would exist irrespective of the candidate's campaign or duties as a legislator. Personal and legislative living expenses shall not include expenses for food, beverages, travel, or communications incurred by the legislator in the performance of the office held.

(10) POLITICAL ACTION COMMITTEE. Any political action committee, club, association, political party, or other group of one or more persons which receives or anticipates receiving contributions or makes or anticipates making expenditures to or on behalf of any elected official, proposition, candidate, principal campaign committee or other political action committee. For the purposes of this chapter, an individual who makes a personal political contribution shall not be considered a political action committee.

(11) PRINCIPAL CAMPAIGN COMMITTEE. The principal campaign committee designated by a candidate under Section 17-5-4. A political action committee established primarily to benefit an individual candidate or an individual elected official shall be considered a principal campaign committee for purposes of this chapter.

(12) PROPOSITION. Any proposal for submission to the general public for its approval or rejection, including proposed as well as qualified ballot questions.

(13) PUBLIC OFFICIAL. Any person elected to public office, whether or not that person has taken office, by the vote of the people at the state, county, or municipal level of government or their instrumentalities, including governmental corporations, and any person appointed to a position at the state, county, or municipal level of government or their instrumentalities, including governmental corporations. For purposes of this chapter, a public official includes the chairs and vice chairs or the equivalent offices of each state political party as defined in Section 17-13-40.

(14) STATE. The State of Alabama.

(15) STATE OFFICE. All offices under the constitution and laws of the state filled by election of the registered voters of the state or of any circuit or district and shall include legislative offices.

(b) The words and terms used in this chapter shall have the same meanings respectively ascribed to them in Section 36-25-1.

*(Acts 1988, 1st Ex. Sess., No. 88-873, p. 397, §2; Acts 1997, No. 97-651, p. 1217, §1; §17-22A-2; amended & renumbered by Act 2006-570, p. 1331, §24.)*



# Appointment of Principal Campaign Committee

Please print in ink or type.

Full Name of Candidate			
Office Sought (include district or circuit number, if applicable)		Political Party / Ballot Affiliation	
Address of the Committee (street or post office box)			
City	State	ZIP Code	Telephone Number

This form is due within **five (5)** calendar days of reaching the threshold amount, or within **five (5)** calendar days of qualifying with a political party, or within **five (5)** calendar days of filing a petition as an independent or third party candidate.

**Type of Committee (check one)**

- I appoint myself as the sole member of my principal campaign committee.
- I hereby appoint the individuals listed below to act as my principal campaign committee.

If you are appointing others to serve as your committee, you must select at least two members. You may appoint up to five members. One member should be designated as the chairperson of the committee. A second member should be designated as the treasurer. Please clearly print their names and addresses in the spaces below. Each appointee must sign his or her name.

Chairperson			
Full Name			
Address (street or post office box)			
City	State	ZIP Code	
Signature of Appointee			

Treasurer			
Full Name			
Address (street or post office box)			
City	State	ZIP Code	
Signature of Appointee			

Committee Member			
Full Name			
Address (street or post office box)			
City	State	ZIP Code	
Signature of Appointee			

Committee Member			
Full Name			
Address (street or post office box)			
City	State	ZIP Code	
Signature of Appointee			

Committee Member			
Full Name			
Address (street or post office box)			
City	State	ZIP Code	
Signature of Appointee			

**Filing Threshold Amounts for Public Offices  
under the Fair Campaign Practices Act**

\$25,000	Statewide office
\$10,000	State Senate seat
\$5,000	State House seat
\$5,000	Circuit or district office
\$1,000	County or municipal office

**Where to file this form ...**

- ▶ State candidates file with the Office of the Secretary of State, located in the Alabama State Capitol, Room E-210. The mailing address is P.O. Box 5616, Montgomery, Alabama 36103-5616.
- ▶ County and municipal candidates file with their county's judge of probate.

As required by the Alabama Fair Campaign Practices Act, I hereby swear or affirm to the best of my knowledge and belief that the information contained herein is true and correct.

_____	_____
Signature of elected official or candidate	Date

## IMPORTANT CANDIDATE INFORMATION

TO: Candidates Qualifying for Elected Office

RE: Filing of Statements of Economic Interests

The Alabama Ethics Law requires that **candidates for elected office at every level of government file a Statement of Economic Interests with the appropriate election official** (i.e., political party, probate judge, or municipal clerk) **simultaneously with the date he or she becomes a candidate**. Such election official then has five days in which to forward the Statement of Economic Interests to the Commission. **Failure to file your Statement of Economic Interests simultaneously with your qualifying papers could result in your name being removed from the ballot**. Please be careful to see that you comply with this section of the law or you may be disqualified as a candidate.

Pertinent sections of the Ethics Law are as follows:

Section 36-25-15(a), Code of Alabama, 1975, provides:

*“(a) Candidates at every level of government shall file a completed statement of economic interests for the previous calendar year with the appropriate election official simultaneously with the date he or she becomes a candidate as defined in Section 17-22A-2 or the date such candidate files his or her qualifying papers with the appropriate election official, whichever date occurs first. Such election official shall within five days forward the statement of economic interests of the candidate to the commission. **Nothing in this section shall be deemed to require a second filing of the person’s statement of economic interests if a current statement of economic interests is on file with the commission.**” (Emphasis added)*

A Statement of Economic Interests shall be completed and filed in accordance with this chapter with the commission no later than April 30 of each year covering the period of the preceding calendar year . . . *Section 36-25-14(a)*.

Section 36-25-15(c), Code of Alabama, 1975, provides:

*“(c) Other provisions of the law notwithstanding, if a candidate does not submit a statement of economic interests in accordance with the requirements of this chapter, the name of the person shall not appear on the ballot and the candidate shall be deemed not qualified as a candidate in that election. Notwithstanding the foregoing, the commission may, for good cause shown, allow the candidate an additional five days to file such statement of economic interests. If a candidate is deemed not qualified, the appropriate election official shall remove the name of the candidate from the ballot.”*

Section 36-25-6, Code of Alabama, 1975, Use of Contributions, provides:

*“Contributions to an office holder, a candidate, or to a public official’s inaugural or transitional fund shall not be converted to personal use.”*

In the event that you have any questions, please contact the Alabama Ethics Commission at 334-242-2997.

## LINE-BY-LINE INSTRUCTIONS FOR COMPLETING THE DOWNLOADABLE STATEMENT OF ECONOMIC INTERESTS FORM

The Legislature feels for matters of the public trust, certain individuals should be required to file Statements of Economic Interests, disclosing potential conflicts of interest. These financial disclosures do not violate the United States Constitution and do not intrude on the employee's financial privacy. While the list of job responsibilities set out in Section 36-25-14 is not all-inclusive, it does give a great deal of guidance. In addition, Section 36-25-2(c) states: *This chapter shall be liberally construed to promote complete disclosure of all relevant information and to insure that the public interest is fully protected.*

There may be sections of this form that do not apply to you personally, but this form was created to best apply to over 50,000 public officials, public employees, candidates for public office, and members of boards, commissions, committees, authorities, councils, etc.

**If you received this form or instructions for downloading from your employer, your name has been submitted to the Alabama Ethics Commission as being required to file for the previous year.** Public officials and public employees who are required to file annual Statements of Economic Interests may be fined \$10.00 per day not to exceed \$1,000 for failure to timely file a Statement of Economic Interests with the Ethics Commission, or be charged with a Class A misdemeanor for intentional failure to file [36-25-14(d) & (e)]. Each person who meets the necessary criteria, regardless of whether they retired the previous year or served/worked in the public position **for any time (even a portion of one day) during the previous year**, is required to file.

### General Information

Top of form: Are You a Candidate? Check Yes or No (REQUIRED) Candidate Year (Enter candidate year)  
For Office In - Check City, County, State (REQUIRED IF ABOVE ANSWER IS YES)

01. REQUIRED FIELDS - Print your entire name, beginning with your last name, & include your nickname, if applicable. Print your entire home address & include both home & business phone numbers. Also, in space provided, print any previous name, if it has changed within past year, i.e. married/divorced
02. REQUIRED FIELDS - Circle appropriate designation - elected official, appointed official, employee. Circle appropriate public entity with which you are associated. Print the name and address of your public position.
  - 02.1 REQUIRED FIELDS - Circle appropriate designation - elected, appointed, official, employee. Print your job title/position for your public employment or office held during the reporting year.
  - 02.2 REQUIRED FIELD OR N/A - Print the name of any **other** public authority (board, commission, committee, authority, council) of which you were a member during the reporting year.
  - 02.3 REQUIRED FIELD - Circle the amount that applies to your earnings in 02. Through 02.2
03. REQUIRED FIELD OR N/A - If applicable, circle appropriate designation and print the name of the office for which **you are** a candidate.
04. REQUIRED FIELD OR N/A - Print the name of the position(s) in which you or your spouse spent 1/3 or more of your time or your spouses time, whether public or private, other than the aforementioned public position(s) in 02.2.
  - 04.1 REQUIRED FIELDS OR N/A - Print the name and address of the business associated with the position mentioned in 04. above. (Print name and address of self-employment in line 04.2.)

- 04.2 REQUIRED FIELD OR N/A - If the position mentioned in 4 was associated with self-employment, print the name & address of that business.
- 04.3 REQUIRED FIELDS – Print your spouses name, address and occupation/business. Print additional family members names where applicable.
05. REQUIRED FIELD - Circle the appropriate amount of earnings as listed in the employment specified in 04. This is employment for you, your spouse and dependents **other than** compensation for your public position.
- 05.1 REQUIRED FIELD OR N/A - Circle the appropriate response if you, your spouse, or your dependent(s) owned 5% or more stock in the company listed in 04.1 and/or 04.2.
- 05.2 REQUIRED FIELD OR N/A - Circle the applicable response if your spouse or you were a consultant and earned more than \$1,000 from the business(es) listed in 04.1 and/or 04.2.
- 05.3 REQUIRED FIELD OR N/A - Circle the appropriate response if you and/or your spouse served as an officer/director/trustee of the business listed in 04.1 and/or 04.2.

### **Other Income**

06. through 06.3 - REQUIRED FIELDS OR N/A

Other than previously mentioned income, list all income such as stocks, fees, dividends, profits, commissions and interest, including interest on bank accounts. Also, include any income or salary in which you spent any amount of time earning but have not listed thus far.

In the first column print the name of the employer, bank, stock, etc. from which the income was derived. In the second column, list the type of income, i.e. interest. In the following columns, check the column with the appropriate amount listed. Add attachments as necessary.

- 06.4 REQUIRED FIELD OR N/A - Circle appropriate designation where you earned more than \$5,000 for one of the incomes mentioned in 06. - 06.3 above.
- 06.5 REQUIRED FIELD OR N/A - Circle the appropriate designation where you earned more than \$1,000 but less than \$5,000 for one of the incomes mentioned in 06. through 06.3 above.
- 06.6 REQUIRED FIELD OR N/A – If yo, your spouse or one of your dependents served as an officer, director, trustee or consultant last year in one of the businesses from which you received income listed in 06. Through 06.3, circle the appropriate designation
- 06.7 REQUIRED FIELD OR N/A - List any business or subsidiary thereof listed above in which you, your spouse or your dependents jointly or severally owned 5% or more stock and/or served as an officer during the reporting year.

### **Real Estate Holdings**

07. This section should be completed **ONLY** by **elected officials, appointed officials or candidates for office. DO NOT include your homestead.** Skip this section and go to 08., if you are NOT an elected or appointed official or a candidate for office.
- 07.1 If you checked yes that you, your spouse and/or your dependents owned real estate **for investment** during the reporting year, list each piece below and check the appropriate boxes. Add attachments as needed.
- 07.2 If you checked yes, list any and all **rent/lease income from any government agency in Alabama** that you, your spouse or your dependents received during the reporting year. Also, the detailed lease/rent agreement shall be filed with the Ethics Commission.

## Indebtedness

08. List, in the appropriate boxes, all debt owed to all businesses operating in Alabama (**doing business in Alabama, regardless of where their home office is located or where you mail your payment**) by you, your spouse, or your dependent children **during reporting year**. In the column How many do you OWE? only include the **number** of banks and/or credit cards with outstanding balances at the **end of reporting year**. (*It is not necessary to list the names of these businesses.*) Then check the column with the range of your total indebtedness, not your actual balances, i.e., if you, your spouse or dependents owe \$25,000 to each of 5 banks, check the \$100,000 or more block. DO NOT list indebtedness associated with your homestead (residence/home) in which you live. If you have a homestead but lived elsewhere for a short time, explain.
- 08.1 REQUIRED FIELD OR N/A - Include number of banks, including banks where you, your spouse or your dependents have had indebtedness & credit cards.
- 08.2 REQUIRED FIELD OR N/A - Include number of credit unions and savings and loan associations in which you, your spouse or your dependents have had indebtedness and include credit cards, if any.
- 08.3 REQUIRED FIELD OR N/A - Include number of insurance companies where you, your spouse or your dependents had indebtedness during reporting year.
- 08.4 REQUIRED FIELD OR N/A - Include number of mortgage companies, **except your homestead**, where you, your spouse or your dependents had indebtedness during reporting year.
- 08.5 REQUIRED FIELD OR N/A - Include number of stockbrokers and/or bond firms where you, your spouse or your dependents had indebtedness during reporting year.
- 08.6 REQUIRED FIELD OR N/A - Include number of individuals and/or any other business(es), including store cards, where you, your spouse or your dependents had indebtedness during reporting year.

## Professional or Consulting Services

09. Complete this section **ONLY** if you or your spouse received income during reporting year in return for **professional or consulting activities**, i.e., **legal, accounting, medical or health-related, real estate, banking, insurance, educational, farming, engineering, architectural management, or other professional services or consultations**. List the number of clients in the appropriate areas and check the dollar amount (range) received. **If this section DOES NOT apply to you, check the appropriate box, skip this section and go to 10.**
10. Read the declaration, sign your full name, include the date signing, and **legibly print** your full name.

## **CANDIDATE INFORMATION . VERY IMPORTANT**

Section 36-25-15 requires candidates at every level of government to file a completed Statement of Economic Interests form for the previous calendar year with the appropriate election official simultaneously with the date he or she becomes a candidate as defined in Section 17-22A-2, Code of Alabama, 1975, or the date such candidate files his or her qualifying papers with the appropriate election official, whichever date occurs first. Failure to comply with this section will result in the candidate being deemed not qualified, and their name being removed from the ballot. (36-25-15(c)).



This Form May Be Completed On-line at [www.ethics.alabama.gov](http://www.ethics.alabama.gov)

CANDIDATE	YES	NO	FOR OFFICE IN	CITY	COUNTY	STATE
(Year)	If you are a candidate, complete this section and see last page of instructions. If you are not a candidate, check "no" and continue.					

### STATEMENT OF ECONOMIC INTERESTS

CANDIDATES must file simultaneously with their qualifying forms as required by Section 36-25-15, Code of Alabama 1975.

Alabama Ethics Commission		
Street Address	Mailing Address	Telephone
100 North Union Street, Suite 104 (RSA Union Building) Montgomery, Alabama 36104	P. O. Box 302300 Montgomery, AL 36130-2300	334-242-2997

PLEASE READ INSTRUCTIONS BEFORE ATTEMPTING TO COMPLETE FORM.

01. Full Name, Home Address, and Telephone Number(s) of Filing Person:

_____	_____	_____	_____	_____
(Last)	(First)	(Middle)	(Suffix)	(Nickname)
_____	_____	_____	_____	_____
(Street)	(Route)	(P.O. Box)	(City)	(Zip)
			(County)	(Home & Business Phones)

IF name changed within past year, please indicate former name:

NAME: \_\_\_\_\_

_____	_____	_____
(Last)	(First)	(Middle)

PLEASE FILL IN THE BLANKS OR CIRCLE THE CORRECT WORD(S) OR NUMBER(S) AS APPROPRIATE

- 02. **Last year**, I was an (elected official) (appointed official) (employee) with the (Municipality) (County) (State) and the name and address of my(department)(office)(agency)(board)(college)(county)(municipality)(commission)was \_\_\_\_\_
- 02.1 As an elected/appointed official/employee **last year**, my job title/position was \_\_\_\_\_
- 02.2 **Last year**, the name(s) of the (State) (County) (Municipal) Board(s), Commission(s), Committee(s), Authority(ies), Council(s), etc. of which I was a Member was(were) \_\_\_\_\_
- 02.3 **Last year** in the above public position(s) in 02. thru 02.2 I earned: (\$0-\$1,000) (\$1,000-\$10,000) (More than \$10,000).
- 03. I am a **candidate** for the (State) (County) or (Municipal) Office of \_\_\_\_\_

04. **Other than my public position(s) in 02. thru 02.2,** my and/or my spouse's occupation(s) or business(es) *last year to which 1/3 or more of working time* was spent (including self-employment) was (were) \_\_\_\_\_

04.1 The **name** and **address** of my employer, listed in 04. above, *last year* was \_\_\_\_\_

04.2 I was self-employed last year and the **name** and **address** of my business *last year* was \_\_\_\_\_

04.3 Information on Family Members: SPOUSE'S Name, address, and business or employer

DEPENDENT CHILDREN Name, address, and any employment \_\_\_\_\_

Names Only of LIVING ADULT CHILDREN

Names Only of LIVING PARENTS

Names Only of LIVING SISTERS/BROTHERS

Names Only of LIVING PARENTS OF SPOUSE

05. **Last year, from the occupations or businesses listed in 04.,** I, my spouse and dependents earned an aggregate of:  
(\$0-\$1,000) (\$1,000-\$10,000) (More than \$10,000).

05.1. **Last year,** (I) (My spouse) (dependents) owned 5% or more of the stock in the firm(s) listed in **04.1, 04.2**

05.2. **Last year,** (I) (My spouse) was a consultant and earned more than \$1,000 from each firm listed in **04.1, 04.2**

05.3. **Last year,** (I) (My spouse) served as an (Officer) (Director) (Trustee) of the firm(s) listed in **04.1, 04.2**

**06. OTHER INCOME INFORMATION ON YOU, YOUR SPOUSE AND DEPENDENT CHILDREN**

List total combined household income, in addition to what is listed in 02.3 thru 05., the names of each business income is derived from, and the income from each business.	Write in type of Income Received: Salaries, Fees, Dividends, Profits, Commissions, Other Compensation (including interest on bank accounts)	Check Appropriate Box					
		Less than \$1,000	\$1,000 to \$10,000	\$10,000 to \$50,000	\$50,000 to \$150,000	\$150,000 to \$250,000	More than \$250,000
06.1							
06.2							
06.3							
06.4 Last year did you earn more than \$5,000 as an: (Circle the applicable one and explain, if necessary.)		Officer	Director	Trustee	Consultant	N/A	
06.5 Last year did you earn more than \$1,000 but less than \$5,000 as an: (Circle the applicable one and explain, if necessary.)		Officer	Director	Trustee	Consultant	N/A	
06.6 Last year, did YOU, YOUR SPOUSE or DEPENDENTS serve as: (Circle the applicable one and explain, if necessary.)		Officer	Director	Trustee	Consultant	N/A	
06.7 Name any business or subsidiary thereof in which you, your spouse, or dependents, jointly or severally, owned 5% or more of the stock or in which you, your spouse or dependents served as an officer, director, trustee, or consultant where the service provides income of at least \$1,000 and less than \$5,000; or at least \$5,000 or more for the reporting period.							

**07. REAL ESTATE HOLDINGS (Exclude your Homestead) (TO BE COMPLETED ONLY BY ELECTED OFFICIALS, APPOINTED OFFICIALS or CANDIDATES for State, County or Municipal Offices.)**

07.1 Did YOU, YOUR SPOUSE OR DEPENDENTS own real estate for investment or revenue production last year?

\_\_\_\_\_ No \_\_\_\_\_ Yes

If yes, list each piece of real estate WHEREVER SITUATED separately below and provide the requested information.

07.2 Did YOU, YOUR SPOUSE, DEPENDENTS or A BUSINESS WITH WHICH YOU ARE ASSOCIATED receive any rent or lease income from any governmental agency in Alabama last year?

\_\_\_\_\_ No \_\_\_\_\_ Yes

If yes, specific details of the lease or rent agreement shall be filed with the Ethics Commission.

**(CHECK APPROPRIATE BOXES and ADD ADDITIONAL SHEETS AS NECESSARY.)**

Location of Real Estate (City, County and State)	What is the fair market value?					What is the annual gross rent or lease income?		
	Less than \$50,000	\$50,000 to \$100,000	\$100,000 to \$150,000	\$150,000 to \$250,000	More than \$250,000	Less than \$10,000	\$10,000 but less than \$50,000	\$50,000 or more

**08. INDEBTEDNESS INFORMATION: Report debts owed to all businesses operating in Alabama\*as of December 31 last year, EXCEPT indebtedness associated with the (homestead) home in which you live. Include debts of YOUR SPOUSE and DEPENDENT CHILDREN. (\*Doing business in Alabama, regardless of where their home office is located or where you mail your payment.)**

Provide actual NUMBER and CHECK APPROPRIATE CATEGORY– it is not necessary to include name of card(s), business(es), account number(s), or actual amount owed. Check appropriate boxes below.

TYPE	How many do you OWE? NUMBER	How much do you OWE? (Check box that relates to the combined total in each category)					
		Less than \$25,000	\$25,000 to \$50,000	\$50,000 to \$100,000	\$100,000 to \$150,000	\$150,000 to \$250,000	More than \$250,000
08.1 Banks (include Credit Cards)							
08.2 Credit Unions and Savings and Loan Associations (include Credit Cards)							
08.3 Insurance Companies							
08.4 Mortgage Firms							
08.5 Stockbrokers or Bond Firms							
08.6 Individuals or other businesses (include store cards)							

**09. PROFESSIONAL OR CONSULTING SERVICES (To be completed if YOU or YOUR SPOUSE received income last year in return for professional or consulting activities, i.e. legal, accounting, medical or health-related, real estate, banking, insurance, educational, farming, engineering, architectural management, or other professional services or consultations, etc. State the number of clients and check appropriate boxes.)**

Check if no income was received for Professional or Consulting Services for the categories of Clients shown below.

Categories of Clients	Number of Clients	Annual Gross Income During Reporting Year								Anticipated Annual Retainer Income		
		Less than \$1,000	\$1,000 to \$10,000	\$10,000 to \$25,000	\$25,000 to \$50,000	\$50,000 to \$100,000	\$100,000 to \$150,000	\$150,000 to \$250,000	More than \$250,000	Less than \$1,000	\$1,000 to \$5,000	More than \$5,000
<b>09.1 UTILITIES</b>												
Electric												
Gas												
Telephone												
Water												
Cable Television Companies												
<b>09.2 TRANSPORTATION</b>												
Intrastate Companies												
Pipeline Companies												

Categories of Clients	Number of Clients	Annual Gross Income During Reporting Year								Anticipated Annual Retainer Income		
		Less than \$1,000	\$1,000 to \$10,000	\$10,000 to \$25,000	\$25,000 to \$50,000	\$50,000 to \$100,000	\$100,000 to \$150,000	\$150,000 to \$250,000	More than \$250,000	Less than \$1,000	\$1,000 to \$5,000	More than \$5,000
Oil Exploration												
Gas Exploration												
Oil and Gas Retailers												
<b>09.3 FINANCE &amp; INSURANCE</b>												
Banks												
Savings & Loan Associations												
Loan and/or Finance Companies												
Manufacturing Firms												
Mining Companies												
Life Insurance Companies												
Casualty Insurance Companies												
Other Insurance Companies												

Categories of Clients	Number of Clients	Annual Gross Income During Reporting Year								Anticipated Annual Retainer Income		
		Less than \$1,000	\$1,000 to \$10,000	\$10,000 to \$25,000	\$25,000 to \$50,000	\$50,000 to \$100,000	\$100,000 to \$150,000	\$150,000 to \$250,000	More than \$250,000	Less than \$1,000	\$1,000 to \$5,000	More than \$5,000
Retail Companies												
Beer Companies												
Wine Companies												
Liquor Companies												
Beverage Distributors												
<b>09.4 ASSOCIATIONS</b>												
Trade												
Professional												
Governmental												
Public Employee												
Public Official												
<b>09.5 GOVERNMENT</b>												
State												
County												
Municipal												
Other Government Corp. Or Authorities												
<b>09.6 MISCELLANEOUS</b>												

**10. DECLARATION OF REPORTING PERSON**

I have read and completed this Statement of Economic Interests, Form ASEC-1(Revised), and do swear (or affirm) that the information contained in said Statement of Economic Interests is true and correct. I fully understand that anyone who violates the disclosure provision of this Act shall be subject to a fine of \$10.00 a day not to exceed \$1,000 annually. I also understand that any attachments that I place with this form become a part of this public record.

SIGNED \_\_\_\_\_ Date \_\_\_\_\_  
(Signature of Reporting Person)

PLEASE PRINT/TYPE NAME OF PERSON SIGNING FORM \_\_\_\_\_

*\*\*\*(Please do not mail the instructions with your form as they may increase your postage and should be destroyed or retained with your copy of your form.)\*\*\**

**RETURN COMPLETED ORIGINAL SIGNED FORM TO:**  
Alabama Ethics Commission

**STREET ADDRESS**  
RSA Union, Suite 104  
100 North Union Street  
Montgomery, AL 36104

**MAILING ADDRESS**  
P.O. Box 302300  
Montgomery, AL 36130-2300





# Waiver of Report

## FOR ELECTED OFFICIALS AND CANDIDATES

(OPTIONAL FORM)

Please Print in Ink or Type.

Name of Candidate or Elected Official		Political Party/Ballot Affiliation	
Office Sought or Held (include district or circuit number, if applicable)			
Address <input type="checkbox"/> Check box if reporting new address			
City	State	ZIP Code	Telephone Number

Type of Report (check one)

- Monthly Report
- Weekly Report
- Daily Report (state candidates and elected officials only)

In any reporting period, no campaign finance report is required if the appropriate filing threshold has not been reached by the candidate. The filing thresholds are as follows:

- ▶ \$25,000 - candidates for state offices
- ▶ \$10,000 - candidates for State Senate
- ▶ \$5,000 - candidates for State House of Representatives
- ▶ \$5,000 - candidates for district or circuit offices
- ▶ \$1,000 - candidates for local offices

I have not reached the filing threshold amount as set forth in the Fair Campaign Practices Act for the office for which I am seeking nomination or election.

This **OPTIONAL** form gives notice that no contribution or expenditure report will be submitted.

Signature of Candidate or Elected Official	Date



# Statement of Dissolution

## FOR ELECTED OFFICIALS, CANDIDATES AND POLITICAL ACTION COMMITTEES

Please Print in Ink or Type.

Name of Candidate or Elected Official, or Political Committee			
Office Sought or Held (include district or circuit number, if applicable)			
Address <input type="checkbox"/> Check box if reporting new address			
City	State	ZIP Code	Telephone Number

Report Status (check one)

- No report required because I have had no activity since the last reporting period
- Termination report attached

**Note:**

If you have had activity since the last report filed, you are responsible for filing the requisite **Annual Report** covering the last year of activity. However, the submission of a **Termination Report** along with the **Statement of Dissolution** will satisfy this requirement.

This statement dissolves the above-named Principal Campaign Committee or Political Action Committee as of the \_\_\_\_\_ day of \_\_\_\_\_ in the year \_\_\_\_\_.

Pursuant to §17-5-7(a) [Code of Alabama, 1975], any excess funds shall be disposed of in the following manner:

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As required by the Alabama Fair Campaign Practices Act, I hereby swear, or affirm, to the best of my knowledge and belief that this Statement of Dissolution is true and correct.

Signature of Candidate or Elected Official, or Chairperson or Treasurer of Political Committee	Date



# Candidate & Elected Official Campaign Finance Report SUMMARY FORM 1

Please Print in Ink or Type.

Name of Candidate or Elected Official		Political Party/Ballot Affiliation	
Office Sought or Held (include district or circuit number, if applicable)			
Address <input type="checkbox"/> Check box if reporting new address			
City	State	ZIP Code	Telephone Number

**Type of Report** (check one)

- Monthly       Amended Monthly  
 Weekly       Amended Weekly

**For Monthly Reports**

Month in which the report is filed.

**For Weekly Reports**

Date of Friday in the week in which the report is filed.

**Total Number of Pages in Report**

## Summary of activity since last filed report

1	Beginning balance (ending balance from previous filing)								
<b>Cash Contributions</b>									
2a	Itemized cash contributions (total from Form 2)	2a							
2b	Non-itemized cash contributions	2b							
2c	Total cash contributions (add lines 2a and 2b)					2c			
<b>In-Kind Contributions</b>									
3a	Itemized in-kind contributions (total from Form 3)	3a							
3b	Non-itemized in-kind contributions	3b							
3c	Total in-kind contributions (add lines 3a and 3b)	3c							
<b>Receipts from Other Sources</b>									
4a	Itemized Receipts from Other Sources (total from Form 4)	4a							
4b	Non-itemized Receipts from Other Sources	4b							
4c	Total receipts from other sources (add lines 4a and 4b)					4c			
<b>Expenditures</b>									
5a	Itemized expenditures (total from Form 5)	5a							
5b	Non-itemized expenditures	5b							
5c	Total expenditures (add lines 5a and 5b)					5c			
6	Ending balance (add lines 1, 2c, & 4c, then subtract line 5c)					6			

**Candidates for State Office:** File this report with the Office of the Secretary of State.

**Candidates for County or Municipal Office:** File this report with the Judge of Probate of the county in which the office is sought.

As required by the Alabama Fair Campaign Practices Act, I hereby swear or affirm to the best of my knowledge and belief that the attached report(s) and the information contained herein are true and correct and that this information is a full and complete statement of all contributions, expenditures, and other required information during the applicable period of time.

Sworn to and subscribed before me this \_\_\_\_\_ day of \_\_\_\_\_ of the year \_\_\_\_\_. My commission expires the \_\_\_\_\_ day of \_\_\_\_\_ of the year \_\_\_\_\_.

\_\_\_\_\_  
Signature of Candidate or Elected Official      Date

\_\_\_\_\_  
Signature of Notary Public

\_\_\_\_\_  
Print Notary's Name



# FORM 2: Contributions received by candidate or elected official

NAME OF CANDIDATE OR ELECTED OFFICIAL: \_\_\_\_\_

When total contributions from a single source exceed \$100.00, the FCPA requires all contributions from that source to be itemized.  
**DO NOT LIST** in-kind contributions or loans on this form. Use Forms 3 and 4 for those listings.

CONTRIBUTOR (INCLUDE FULL NAME)	ADDRESS (ADDRESS SHOULD INCLUDE STREET OR P.O. BOX, CITY, STATE, AND ZIP)	SOURCE OF CONTRIBUTION (CHECK ONE)						DATE CONTRIBUTION RECEIVED (mo./day/yr.)	AMOUNT OF CONTRIBUTION
		Business or Corporation	Individual	PAC	Other	Returned			
<b>TOTAL CASH CONTRIBUTIONS THIS PAGE</b>									





# FORM 4: Receipts from Other Sources loans, interest, and other sources of income

NAME OF CANDIDATE OR ELECTED OFFICIAL: \_\_\_\_\_

When total contributions from a single source exceed \$100.00, the FCPA requires all contributions from that source to be itemized.  
**DO NOT LIST** cash or in-kind contributions on this form. Use Forms 2 and 3 for those listings.

SOURCE OF RECEIPT (INCLUDE FULL NAME)	ADDRESS (ADDRESS SHOULD INCLUDE STREET OR P.O. BOX, CITY, STATE, AND ZIP)	FORM OF RECEIPT			COMPLETE THIS BLOCK IF RECEIPT IS A LOAN  GUARANTORS  [FCPA REQUIRES FULL NAME AND COMPLETE ADDRESS OF INDIVIDUAL(S) ENDORSING OR GUARANTEEING LOAN]	RECEIPT SOURCE (CHECK ONE)						DATE RECEIVED (mo./day/yr.)	AMOUNT OF RECEIPT
		Interest	Loan	Other		Lending Institution	PAC	Individual	Business	Other			
<b>TOTAL RECEIPTS THIS PAGE</b>													





STATE OF ALABAMA )
)
\_\_\_\_\_ COUNTY )

I hereby declare that I am a candidate for the 2012 Republican nomination (or election) for the office of \*\_\_\_\_\_.

I certify that (1) I possess the qualifications fixed by law for said office and will in no way be disqualified from the same, (2) I am not subject to disqualification from registering and voting under § 177 of the Alabama Constitution of 1901 as amended or § 17-3-30 of the Code of Alabama (1975), (3) I have not been convicted of a felony under the laws of the United States or of another State and (4) I am a Republican and I endorse and will actively support the principles and policies of the Republican Party. \*\*

I further declare myself as the person chosen to serve as the principal campaign committee to receive, expend, audit and disburse all monies contributed, donated, subscribed or in any way furnished or raised for the purpose of aiding or promoting my nomination or election as such candidate in accordance with Chapter 5 of Title 17 of the 1975 Code of Alabama, as amended, (Fair Campaign Practices Act). \*\*\*

This the \_\_\_\_\_ day of \_\_\_\_\_, 201\_\_.

WITNESS:

\_\_\_\_\_  
(Signature of Candidate)  
\_\_\_\_\_  
Residence Address (no Post Office Boxes)  
\_\_\_\_\_  
City ZIP  
\_\_\_\_\_  
Home Phone Office Phone

(TYPE OR PRINT NAME AS YOU WISH IT TO APPEAR ON BALLOT - NO TITLES)

INSTRUCTIONS

\*Describe office with completeness, for example: County Commissioner, Place No. 2; Member of Congress Fifth District; Circuit Judge, 10th Judicial Circuit, Place No. 8; Associate Justice of Supreme Court, Place No. 2; President, Public Service Commission. Place number must be shown where two or more are to be elected.

\*\*Challenges to a candidate's qualifications, based on party loyalty or otherwise, are heard by the Candidate Committee of the Alabama Republican Party for non-county offices and by the applicable county executive committee or its properly designated election subcommittee for county offices.

\*\*\*Candidates desiring to appoint others to official finance committee (as permitted by Section 17-5-4 Code of Alabama 1975, as amended) may do so by striking through third paragraph of above declaration and adding on this form appropriate appointment and acceptance.