

# RECALL OF CONGRESSIONAL, COUNTY AND STATE OFFICIALS

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## **Introduction**

Recall gives voters the right to reconsider their choice of an elected official; however, it does not automatically result in removal of an official from office. It provides an opportunity for voters to require an elected official to run for office again before the expiration of his or her term. The requirements for initiating recall efforts are very specific and must be carefully followed.

The statutory provisions for recalling state, county, congressional, legislative, and judicial elected officials are provided in §9.10, Wis. Stats. These include registering with the appropriate filing officer, and preparing, circulating, and filing a petition.

A “Glossary of Terms” used in the discussion of recall procedures is found on pages 10-11.

### **Recall of Congressional, County and State Officials: §§9.10(1) and (3), Wis. Stats.**

The qualified electors of any state, county, congressional, legislative, judicial, or of any prosecutorial unit may petition for the recall of any incumbent elected official by filing a petition with the same official or agency with whom nomination papers or declarations of candidacy for the office are filed, demanding the recall of the officeholder. This is an extension of the right to recall congressional, judicial, legislative, or county officials found in the Wisconsin Constitution since November, 1926. See *Wisconsin Constitution, Article XIII, Section 12*.

### **Recall of Local Elected Officials**

The qualified electors of any city, village, town, town sanitary district, or school district may also petition for the recall of any incumbent elected official. Please see the Government Accountability Board Manual “Recall of Local Elected Officials” with information on this process.

### **Who Can be Recalled?**

Any elected officeholder who has served one year of the term for which he or she was most recently elected, as of the date the recall petition is offered for filing, can be recalled.

§9.10(2)(s), Wis. Stats.

After one recall petition and recall election, no further recall petition may be filed against the same official during the term for which he or she was elected. §9.10(6), Wis. Stats.

If the regular term of an elected officeholder’s position is scheduled for re-election at the fall election to be held within six weeks of the date the recall petition is filed, a recall election may not be held.

## **Who Can Initiate a Recall?**

Any qualified elector of the election district from which the officeholder was elected may initiate a recall. A qualified elector is a United States citizen, 18 years of age or older, who has resided in the district or jurisdiction for at least 10 days. (Disqualification of electors is addressed in §6.03, Wis. Stats. A disqualified elector under §6.03, Wis. Stats., may not initiate a recall.) The person who files the recall petition is referred to as the petitioner.

## **Registration of a Recall Committee**

Before circulating a petition for recall the petitioner must register with the appropriate filing officer (See "*Glossary of Terms*" for definition of filing officer). Pursuant to §9.10(2)(d), Wis. Stats., registration is accomplished by filing a Campaign Registration Statement (GAB-1) under §11.05(1) or (2), Wis. Stats. A registration form (GAB-1) is included with this manual.

Pursuant to §9.10(2)(d), Wis. Stats., a Statement of Intent to Circulate Recall Petition must be attached to the registration form indicating:

- a) the petitioner's intent to circulate a recall petition and
- b) the name of the officeholder for whom recall is sought.

A form Statement of Intent to Circulate Recall Petition is included with this manual.

After the petitioner has completed registration with the filing officer, circulation of the petition may begin.

## **Petition Format Requirements**

The format of a recall petition must meet certain statutory requirements found in §9.10(2), Wis. Stats. In addition, other requirements as to preparation and form of the petition are governed by §8.40, Wis. Stats. A sample Recall Petition (GAB-170) is included with this manual.

Recall Petition Requirements:

- Every recall petition must have on its face, at the top, in bold print, the words "**RECALL PETITION.**"
- The recall petition must identify the name of the officeholder. If more than one officeholder is to be recalled, a separate petition must be circulated and filed for each. Only one officeholder can be named on a recall petition.

Each petition must provide a space for electors to:

- Sign their name
- List their municipality of residence, along with the post office address, including street and number, if any, or rural route (the address must be complete and clearly show that the signer resides in the district or jurisdiction represented by the officeholder).
- List the date of signing.
- Each separate sheet of a recall petition must contain a completed Certification of Circulator.

**Circulating the Recall Petition: §9.10(2)(d), Wis. Stats.**

Circulation of the recall petition must be completed within 60 days after registration. The completed petition must be returned to the filing officer, that is, “offered for filing,” no later than 5:00 p.m. on the 60<sup>th</sup> day from the date of registration. Any signature on a recall petition that is dated either before the date of registration or more than 60 days after registration is invalid.

**Number of Signatures Required: §9.10(1)(b), Wis. Stats.**

The petition must contain the signatures of qualified electors equal to at least 25% of the vote cast for the office of Governor at the last gubernatorial election held within the same district or jurisdiction as that of the officeholder. The filing officer is required to determine, and inform any interested person upon request, the number of signatures required to recall an officeholder of that district or jurisdiction.

**Individual Signature Requirements**

The specific requirements that apply to each signature on a petition to recall a local officeholder are listed here and can also be found in GAB 2.09, Wis. Adm. Code, which incorporates by reference the requirements of GAB 2.05, Wis. Adm. Code.

- The signature listed must be that of a qualified elector of the jurisdiction or district represented by the officeholder.
- The full address, including municipality of residence, of each signer must be listed on the petition and must be within the election district or jurisdiction of the officeholder.
- Each signature must be dated when it is affixed to the petition.
- The date of the signature must be within 60 days from the date the recall petitioner registered with the filing officer.
- The date of the signature must not be later than the date of the circulator’s signature in the Certification of Circulator.

**Certification of Circulator: §§9.10(2)(a) and 8.40(2), Wis. Stats.**

Each page of a recall petition must contain the Certification of Circulator. The language of the certification must comply with the requirements of §8.40(2), Wis. Stats. The certification must be completed by the circulator, after the signatures are obtained.

Specific requirements of the circulator are:

- The circulator must list his or her full address, including municipality of residence, and street and number, if any, or rural route.
- The circulator must sign and date the certification after he or she has obtained the signatures.

- The person signing as circulator must have personally circulated the petition and personally obtained each of the signatures on the paper.
- The circulator must state that he or she is aware that falsifying the certification is punishable under §12.13(3) (a), Wis. Stats.

**Review of Petition by Filing Officer: §9.10(3)(b), Wis. Stats.**

The filing officer should notify the official subject to the recall petition that one has been “offered for filing” against him or her. This is not required by law.

Within 31 days after the petition is “offered for filing,” the filing officer is required to determine the sufficiency of the petition. §9.10(4)(a), Wis. Stats. (See also GAB 2.05 and 2.09, Wis. Adm. Code, regarding the treatment and sufficiency of petitions.) A careful review of the face of the petition must be done by the filing officer to verify that:

- The format of the petition follows the requirements of §8.40, Wis. Stats.
- The petition contains all the information required under §9.10, Wis. Stats., and clearly informs the electorate of the intentions of the petitioner.
- Each signer is a qualified elector of the district represented by the officeholder.
- The address listed by each signer is within the district represented by the officeholder.
- The date of signing for each elector is within the 60-day circulation period, and not later than the date the certification was signed by the circulator.
- The circulator has properly completed the Certification of Circulator (See previous section for requirements of circulator.)

NOTE: The officeholder who is the subject of the recall petition may file a written challenge to the petition. (See “*Challenges to a Recall Petition*” on pages 6-7.)

**Certificate of Sufficiency/Insufficiency**

The filing officer’s findings must be stated in a certificate attached to the petition within 31 days after the petition is “offered for filing.” The certificate must state the number of petition sheets filed with the filing officer and the number of valid signatures. If the petition is found to be sufficient, the filing officer shall file the petition and call a recall election, subject to the special note in next paragraph. If the petition is found to be insufficient, the certificate shall state the particulars creating the insufficiency (See “*Correcting an Insufficient Petition*” on page 6.)

**Special note:** Within seven days after a filing officer makes a final determination of sufficiency or insufficiency of a recall petition, the petitioner or the officer against whom the recall petition is

filed may file a petition for a writ of mandamus or prohibition with the circuit court for the county where the recall petition is “offered for filing” as prescribed by §9.10(3)(bm), Wis. Stats. The circuit court may stay the effect of the filing officer’s order while the petition is under advisement of the circuit court. The Circuit Court may also order the official to revise the election schedule contained in the order, if a revised scheule is necessitated by judicial review. Whenever the recall petitioner files a petition for a writ of mandamus or prohibition, the officer against whom the recall petition is field shall be a party to the proceeding. (See “*Appeal of Determination of Sufficiency*” on page 10.)

### **Correcting an Insufficient Petition**

If a recall petition is found to be insufficient the certificate shall state the particulars creating the insufficiency and a petitioner may amend the petition by filing affidavits or other proof correcting certain insufficiencies within 5 days following the attachment of the original certificate by the filing officer. §9.10(3)(b), Wis. Stats.

Correctable insufficiencies (See §9.10(2)(e) and (r), Wis. Stats.) include, but are not limited to:

- The failure of the circulator to sign the certification or to include all required information.
- The person signing the petition omitted the date or wrote the incorrect date.
- The failure of the circulator to write his or her complete address on the certification.

Within 5 days after the amended petition is offered for filing, the filing officer shall again carefully examine the face of the petition to determine its sufficiency and attach an amended certificate stating the findings. §9.10(3)(b), Wis. Stats.

If the filing officer makes a finding that the petition is sufficient, he or she shall call a recall election.

### **Challenges to a Recall Petition**

Within 10 days after a recall petition is “offered for filing” with the appropriate filing officer, the officeholder can challenge its sufficiency. The challenge must be made in the form of a written, sworn complaint filed with the appropriate filing officer who received the recall petition. §9.10(3)(b), Wis. Stats. and GAB ch. 2, Wis. Adm. Code.

The challenge must specify any alleged insufficiency in the petition. §9.10(3)(b), Wis. Stats. and GAB ch. 2, Wis. Adm. Code. Any challenge to the validity of signatures on a recall petition must demonstrate by affidavits or other supporting evidence a failure to comply with statutory requirements. The burden of proof is on the challenger. The information on a recall petition is presumed to be valid unless proven otherwise. GAB 2.05(4), Wis. Adm. Code.

Some of the grounds for challenge and the resulting effect are:

- Grounds: An elector has signed the recall petition more than once.  
Resulting Effect: The second and subsequent signatures are not counted.
- Grounds: A person signed the name of another elector.  
Resulting Effect: The signature may not be counted, unless the elector was unable to sign due to physical disability and authorized the individual to sign on his or her behalf. In this case, a notation clarifying the situation should be made on the petition by the signer.
- Grounds: An individual is ineligible to sign the petition because he or she is not a qualified elector of the district or jurisdiction.  
Resulting Effect: The signature may not be counted.
- Grounds: A challenger establishes that the purpose of the petition was misrepresented by the circulator and the signer was not aware of the purpose of the petition.  
Resulting Effect: The signature may not be counted.
- Grounds: A signature is obtained before the first day for circulation, after the last day for circulation, or after the date of certification contained in the certificate of circulator.  
Resulting Effect: The signature may not be counted.

When a challenge is made, the filing officer must review the challenge, all rebuttals, and replies, and make a determination of sufficiency within 14 days after the expiration of time allowed for such challenges, rebuttals, and replies as set forth below. §9.10(3)(b), Wis. Stats.

### **Rebuttals and Replies**

The filing officer is required to determine the sufficiency of the petition within 31 days after the petition is “offered for filing.” §9.10(3)(b), Wis. Stats. If a challenge is filed within 10 days after the petition is “offered for filing,” the following schedule for a rebuttal, reply, and final sufficiency determination totals the maximum 31 days for determining sufficiency of the petition.

Within 5 days after a challenge is filed, the petitioner may file, with the filing officer, a written rebuttal to the challenge.

Within 2 days after the filing of a rebuttal, the officeholder may file a reply to any new matter raised in the rebuttal.

Within 14 days after the expiration of time allowed for the officeholder to file a reply to the rebuttal, the filing officer shall file the certificate of sufficiency/insufficiency.

**Date of Recall Election: §9.10(3)(b), Wis. Stats.**

If the filing officer finds that the petition is sufficient, the filing officer shall file the petition and call a recall election to be held on the Tuesday of the 6th week commencing after the date the filing officer files the petition. If that Tuesday is a legal holiday, the recall election shall be held on the first day after Tuesday which is not a legal holiday.

**Recall Primary: §9.10(3)(d-f), Wis. Stats.**

If more than two persons compete for the office, a recall primary will be held on the date originally set for the recall election. The recall election will then be held on the Tuesday of the fourth week after the recall primary. If that day is a legal holiday, the recall election will be held on the first day after Tuesday which is not a legal holiday. §9.10(3)(f), Wis. Stats.

The two candidates receiving the highest number of votes in the recall primary will be certified to appear on the ballot in the recall election.

**Non-Partisan Office**

If in a recall primary for a non-partisan office, the incumbent officeholder or any other candidate at the recall primary receives the *majority* of the total number of votes cast in the recall primary, that person shall be elected to serve for the residue of the unexpired term of the incumbent and the recall election will not be held. §9.10(3)(d), Wis. Stats.

**Partisan Office**

For any partisan office, a recall primary shall be held for each political party which is entitled to a separate ballot under §5.62 (1) (b) or (2), Wis. Stats., and from which more than one candidate competes for the party's nomination in the recall election. The primary ballot shall be prepared in accordance with §5.62, Wis. Stats., insofar as applicable. The person receiving the highest number of votes in the recall primary for each political party shall be that party's candidate in the recall election. Independent candidates shall be shown on the ballot for the recall election only. §9.10(3)(e), Wis. Stats.

**Candidates at the Recall Election: §9.10(3)(c), Wis. Stats.**

**There are no filing requirements for an incumbent officeholder.** The officeholder against whom the recall petition is filed shall automatically appear on the ballot as a candidate at the recall election, or at the primary if a primary is required, unless the officeholder resigns within 10 days after the date the certificate of sufficiency is issued. All other candidates must file a registration statement (GAB-1,) circulate and file nomination papers (GAB-168 or 169), and file a declaration of candidacy (GAB-162) with the appropriate filing officer. Copies of the most current forms are available from the filing officer. If a candidate fails to file any of the three forms listed below by the filing deadline of 5:00 p.m. on the 4<sup>th</sup> Tuesday before the recall election or recall primary, the candidate's name will not be placed on the ballot.

**1) Campaign Registration Statement (GAB-1)**

Candidates at the recall election must register with the appropriate filing officer by filing a Campaign Registration Statement (GAB-1), as soon as they form the intent to be a candidate



and before receiving contributions or making disbursements. The deadline for registration is 5:00 p.m. on the 4<sup>th</sup> Tuesday before the date of the recall election or recall primary.

**2) Declaration of Candidacy (GAB-162)**

A Declaration of Candidacy (GAB-162) must also be filed by candidates at the recall election no later than the deadline for filing nomination papers, which is 5:00 p.m. on the 4<sup>th</sup> Tuesday before the date of the recall election or recall primary. The candidates must designate on this form the same office title as appears on the nomination papers.

**3) Nomination Papers for Nonpartisan Office or Partisan Office**

**A. Nomination Papers for Nonpartisan Office (GAB-169)**

Candidates at the recall election for a nonpartisan office must circulate and file nomination papers. §9.10(3)(c), Wis. Stats. The proper form is Nomination Paper for Nonpartisan Office (GAB-169). The nomination papers must contain at least the required minimum number of valid signatures of qualified electors and must be filed no later than 5:00 p.m. on the 4<sup>th</sup> Tuesday before the date of the recall election or recall primary (For the number of signatures required, check with the filing officer, or refer to §8.10(3), Wis. Stats.)

Candidates for the recall election must designate, on their nomination papers, which position they are seeking.

**B. Nomination Papers for Partisan Office (GAB-168)**

Candidates at the recall election for a partisan office must circulate and file nomination papers. §9.10(3)(c), Wis. Stats. The proper form is Nomination Paper for Partisan Office (GAB-168). The nomination papers must contain at least the required minimum number of valid signatures of qualified electors and must be filed no later than 5:00 p.m. on the 4<sup>th</sup> Tuesday before the date of the recall election or recall primary (For the number of signatures required, check with the filing officer, or refer to §8.10(3), Wis. Stats.)

Candidates for the recall election must designate, on their nomination papers, which position they are seeking.

**Interim Position of Incumbent**

If the officeholder resigns after the completion of the petitioner's registration, but before the filing of the petition, or before the primary or election, the recall proceeds unaffected. However, the time of resignation may affect whether the resigned officeholder appears on the ballot. If the officeholder resigns more than 10 days after the date of certification of the recall petition, the resigned officeholder remains on the ballot for the recall primary or recall election. §9.10(3)(c), Wis. Stats.

If the officeholder does not resign, he or she continues to perform the duties of the office. If the incumbent is defeated at the recall election, he or she continues to perform the duties until a certificate of election is issued to the successor. §9.10(5)(b), Wis. Stats.

**Appeal of Determination of Sufficiency: §9.10(3)(bm), Wis. Stats.**

Within 7 days after an official makes a final determination of sufficiency or insufficiency of a recall petition, the petitioner or the officer against whom the recall petition is filed may file a petition for a writ of mandamus or prohibition with the circuit court for the county where the recall petition is offered for filing. Upon filing of such a petition, the only matter before the court shall be whether the recall petition is sufficient. The court may stay the effect of the filing officer's order while the petition is under advisement and may order the filing officer to revise the election schedule contained in the order, if a revised schedule is necessitated by judicial review. Whenever the recall petitioner files a petition, the officer against whom the recall petition is filed shall be a party to the proceeding. The court shall give the matter precedence over other matters not accorded similar precedence by law.

**Campaign Finance Disclosure Requirements**

Petitioners seeking to recall elected officials must comply with the campaign finance disclosure requirements of Wisconsin law, Ch. 11, Wis. Stats. The filing of a Campaign Registration Statement (GAB-1) containing a declaration of intent to circulate a recall petition is treated as registration for campaign finance disclosure purposes. Anyone who wishes to oppose the recall by raising contributions, or by making disbursements or incurring obligations in excess of \$25, must also register with the same filing officer.

Any contributions raised and any disbursements made in support of, or in opposition to, the recall effort are required to be reported to the filing officer unless the registrant has applied and qualified for exempt status. The Campaign Finance Report (GAB-2), which is used for all other campaign finance reporting, should be used to report all contributions, disbursements, and incurred obligations of a recall committee.

Any committee or individual who supports or opposes an effort to circulate a recall petition is required to file a Campaign Finance Report (GAB-2), no later than 30 days after the date of registration or within 5 days after the recall petition has been filed, whichever is earlier. The filing officer must send notice of the filing deadlines and reporting periods to the recall committee and to any other recall registrant. After conclusion of the recall action, each registrant should file a termination report with the filing officer.

**Glossary of Terms**

*Certification of Circulator*—a statement at the bottom of each sheet of a petition, which is signed by the circulator.

*Campaign Finance Report*—Government Accountability Board form (GAB-2) for financial disclosure, to be filed, if required, by the petitioner, candidates at the recall election, and other registrants supporting or opposing the recall effort. (Sample is included with this manual.)

*Campaign Registration Statement*— Government Accountability Board form (GAB-1), filed by petitioner to register intent to file a recall petition; each candidate at the recall election, except for the officeholder; and any others actively supporting or opposing the recall effort. (Sample is included with this manual.)

*Circulation period*—a 60-day period beginning the day after registration.

*Circulator* —a qualified elector who circulates a petition. (A circulator is not required to be a resident of the jurisdiction or district subject to recall.)

*Declaration of Candidacy* — Government Accountability Board form (GAB-162), a statement of qualification to hold office if elected, to be filed by all candidates at the recall election, except for the officeholder. (Sample is included with this manual.)

*Filed*—the recall papers have been reviewed and a certificate of sufficiency or insufficiency is attached by the filing officer.

*Filing Officer*—for county officials it would be the county clerk , for district attorneys, State Senators, State Representatives, Congressional Member or U.S. Senators, it would be the Government Accountability Board.

*Nomination Papers*—Government Accountability Board form (GAB-169), for nonpartisan offices, or Government Accountability Board form (GAB-168), for partisan offices, to be filed by candidates at the recall election, except for the officeholder.

*Offered for filing*—submitting the petition to the filing officer for review for certificate of sufficiency or insufficiency (note: the filing officer should not accept partial petitions and make partial determinations of sufficiency until such time as the petitioner is submitting the petition for a complete review for sufficiency and the filing officer is prepared to make the sufficiency determination.)

*Officeholder*—the elected official for whom recall is sought.

*Petition*—Government Accountability Board form (GAB-170), a sworn document which conforms to §§8.40 and 9.10(2), Wis. Stats. (Sample is included with this manual.)

*Petitioner*—the individual or group initiating and filing the recall petition.

*Registration*—the act of filing a Campaign Registration Statement (GAB-1) with the appropriate filing officer along with a Statement of Intent to Recall, which includes the name of the officeholder and the reason for recall. (Samples are included with this manual.)

*Sworn Complaint*—a written challenge, sworn to before a person authorized to administer oaths. For more information about filing a complaint with the Government Accountability Board, please contact the G.A.B. at (608)266-8005 or review information found on the website at <http://gab.wi.gov>.

Questions concerning recall of statewide or constitutional officials should be directed to the correct filing officer or to the Wisconsin Government Accountability Board. All forms and a copy of this manual can be found at the Wisconsin Government Accountability Board Website listed below.

This manual has been approved by the:

Wisconsin Government Accountability Board  
212 East Washington Avenue  
P.O. Box 7984  
Madison, Wisconsin 53707-7984  
(608) 266-8005  
FAX (608) 267-0500  
<http://gab.wi.gov>

# CAMPAIGN REGISTRATION STATEMENT

## STATE OF WISCONSIN

### GAB-1

FOR OFFICE USE ONLY
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IF A CANDIDATE DOES NOT FILE THIS STATEMENT BY THE DEADLINE FOR FILING NOMINATION PAPERS,  
THE CANDIDATE'S NAME WILL NOT BE PLACED ON THE BALLOT.

**NOTICE:** ANY CHANGE OF INFORMATION ON THIS REGISTRATION STATEMENT MUST BE FILED WITHIN 10 DAYS.

IS THIS AN AMENDMENT?     Yes     No

#### 1. CANDIDATE AND CANDIDATE COMMITTEE INFORMATION

Name of Candidate	Party Affiliation	Office Sought (include district or branch number)
Residence Address (number and street)	Primary Date	Candidate Telephone Number (residence)
City, State and Zip Code	Election Date	Candidate Telephone Number (employment)
Campaign Committee Name (if any)    Check One: <input type="checkbox"/> Personal Campaign Committee <input type="checkbox"/> Support Committee		Candidate Email Address (optional)
Campaign Committee Address (if different than above) - Number, Street, City, State and Zip Code		
Telephone Number (if different than above)		

#### 2. POLITICAL COMMITTEE INFORMATION

(For use ONLY by Political Action Committees, Political Party Committees, Political Groups, etc.)

Name of Committee
Address - Number, Street, City, State and Zip Code
Telephone Number
Sponsoring Organization - Name and Complete Address
Acronym (if any)
<p><b>Type of Committee:</b></p> <p>A.   <input type="checkbox"/> Special Interest Committee (PAC)</p> <p style="margin-left: 20px;"><input type="checkbox"/> Resident Committee    <input type="checkbox"/> Nonresident Committee</p> <p style="margin-left: 20px;"><input type="checkbox"/> Incorporated Labor Organization - Attach Information Required by s.11.05(3)(n), Stats.</p> <p>B.   <input type="checkbox"/> Political Party Committee</p> <p style="margin-left: 20px;"><input type="checkbox"/> National    <input type="checkbox"/> State    <input type="checkbox"/> County    <input type="checkbox"/> Other _____</p> <p>C.   <input type="checkbox"/> Legislative Campaign Committee - Attach Statement Required by s.11.05(3)(o), Stats.</p> <p>D.   <input type="checkbox"/> Political Group (Referendum) _____    <input type="checkbox"/> Support    <input type="checkbox"/> Oppose</p> <p style="margin-left: 100px;">Name of Referendum</p> <p>E.   <input type="checkbox"/> Recall Committee _____    <input type="checkbox"/> Support Recall    <input type="checkbox"/> Oppose Recall</p> <p style="margin-left: 100px;">Name of Officer Subject to Recall</p> <p style="margin-left: 20px;">- Attach Statement Required by s.9.10(2)(d)</p> <p>F.   <input type="checkbox"/> Independent Committee - Also, Complete Oath of Independent Expenditures, Form EB-6</p> <p>G.   <input type="checkbox"/> Individual - Also, Complete Oath of Independent Expenditures, Form EB-6</p>

**3. COMMITTEE TREASURER** (Campaign finance correspondence is mailed to this address.)

Treasurer's Name	Telephone Number (residence)
Address (number and street)	Telephone Number (employment)
City, State and Zip Code	

**4. PRINCIPAL OFFICERS OF COMMITTEE AND OTHER CUSTODIANS OF BOOKS AND ACCOUNTS**

Attach additional listing if necessary. Indicate which officers or committee members are authorized to fill a vacancy in nomination due to death of candidate by an asterisk(\*). This provision only applies to independent and local nonpartisan candidates. s.8.35, Stats.

NAME	MAILING ADDRESS	POSITION

**5. DEPOSITORY INFORMATION**

Name of Financial Institution	Account Number (Attach list of any additional accounts and deposit boxes, location, type and number, i.e., savings, checking, money market, etc.)
Address (number and street)	City, State and Zip Code

**CERTIFICATION**

**TREASURER**

I, \_\_\_\_\_ (print full name) certify the information in this statement is true, correct and complete.

Signature \_\_\_\_\_, Treasurer \_\_\_\_\_  
Date \_\_\_\_\_

**CANDIDATE**

I, \_\_\_\_\_ (print full name) certify the information in this statement is true, correct and complete, and that this is the only committee authorized to act on my behalf.

Signature \_\_\_\_\_, Candidate \_\_\_\_\_  
Date \_\_\_\_\_

**+++ EXEMPTION FROM FILING CAMPAIGN FINANCE REPORTS §11.05(2r), Wis. Stats. +++**

You may be eligible for an exemption from filing campaign finance reports. Consult the Campaign Finance Instruction and Bookkeeping Manual to determine if the registrant qualifies for exemption.

This registrant is eligible for exemption. This registrant will not accept contributions, make disbursements or incur obligations in an aggregate amount of more than \$1,000 in a calendar year or accept any contribution or cumulative contributions of more than \$100 from a single source during the calendar year, except contributions by a candidate to his or her campaign of \$1,000 or less in a calendar year.

This registrant is no longer eligible to claim exemption.

Signature of Candidate or Treasurer \_\_\_\_\_ Date \_\_\_\_\_

THE INFORMATION ON THIS FORM IS REQUIRED BY §§9.10(2)(d), 11.05, 11.06(7), WIS. STATS. FAILURE TO PROVIDE THE INFORMATION MAY SUBJECT YOU TO THE PENALTIES OF §§8.30(2), 11.60, 11.61, 11.66, WIS. STATS.



## RECALL PETITION

TO: \_\_\_\_\_  
(official with whom nomination papers or declaration of candidacy for the office is filed)

We, the undersigned qualified electors of the \_\_\_\_\_  
(jurisdiction or district of officeholder)

petition for the recall of \_\_\_\_\_  
(name of officeholder to be recalled and office) from office pursuant

to Article XIII, Section 12 of the Wisconsin Constitution and S. 9.10 of the Wisconsin Statutes.

### STATEMENT OF REASON FOR RECALL

*(The reason for recall must be stated on petitions for city, village, town, and school district officials. The reason must be related to the official responsibilities of the officeholder. No statement of reason is required to initiate the recall of state, congressional, legislative, judicial, or county officials.)*

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THE MUNICIPALITY USED FOR MAILING PURPOSES, WHEN DIFFERENT THAN MUNICIPALITY OF RESIDENCE, IS NOT SUFFICIENT. THE NAME OF THE MUNICIPALITY OF RESIDENCE MUST ALWAYS BE LISTED.			
SIGNATURES OF ELECTORS	STREET & NUMBER OR RURAL ROUTE <small>Rural address must also include box or fire no.</small>	MUNICIPALITY OF RESIDENCE <small>Indicate Town, City, or Village</small>	DATE OF SIGNING
1.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
2.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
3.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
4.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
5.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
6.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
7.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
8.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
9.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
10.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	

### Certification of Circulator

I, \_\_\_\_\_, certify:  
(name of circulator)

I reside at \_\_\_\_\_  
(circulator's residence - include number, street, and municipality)

I personally circulated this recall petition and personally obtained each of the signatures on this paper. I know that the signers are electors of the jurisdiction or district represented by the officeholder named in this petition. I know that each person signed the paper with full knowledge of its content on the date indicated opposite his or her name. I know their respective residences given. I support this recall petition. I am aware that falsifying this certification is punishable under S. 12.13(3)(a), Wis. Stats.

\_\_\_\_\_  
(date) \_\_\_\_\_  
(signature of circulator)



## INSTRUCTIONS FOR PREPARING RECALL PETITIONS

This is a sample recall petition form. It conforms to the statutory requirements for recall petitions. This form may be reproduced. The State Elections Board has determined that no disclaimer or other attribution statement is required on recall petitions.

**Registration** - Before circulating a recall petition, the persons or committees seeking to recall an elected official must register with the appropriate filing officer indicating their intent to circulate a recall petition and the name of the officer to be recalled. Petitions for the recall of local election officials must state the reasons for the recall which relate to the official duties of the person to be recalled.

**Required Signatures** - The number of signatures required to recall an elected official is specified in S. 9.10(1)(b), (c), Wis. Stats. The filing officer is required to determine and certify to any person the number of signatures required on a recall petition. It is recommended that a person seeking to recall elected officials consult with an attorney concerning the validity of signatures on recall petitions. S. 9.10(2)(e), Wis. Stats.

**Filing Officer** - The recall petition shall be directed to the official with whom nomination papers or a declaration of candidacy for the office of the person to be recalled is filed.

**Jurisdiction** - The name of the jurisdiction or district that the officeholder represents shall be placed on the recall petition, along with the name of the officeholder to be recalled, and the office held.

**Reasons for Recall** - Recall petitions for elected officials representing city, village, town, and school district offices must state reasons for the recall which relate to the official duties of the official to be recalled. *No statement of reason is required to initiate the recall of state, congressional, legislative, judicial, or county elected officials. The lines can be left blank.*

**Signatures of Electors** - Only qualified electors of the jurisdiction or district represented by the officeholder may sign the petition. Each elector's municipality of residence must be listed on the petition, along with the mailing address, including any street, fire or rural route number, box number (if rural route) and street or road name. The Street & Number or Rural Route section for each elector's address is split into two lines. The first line is for the street address. The second line is for the municipality for mailing purposes. The Municipality of Residence listed for each signing elector must clearly identify the town, village or city where the elector's voting residence is located. A post office box number alone does not show where the elector actually resides. The date the elector signed the petition, including month, day and year, must be indicated. Ditto marks that follow correct and complete address or date information are acceptable. The circulator may add any missing or illegible address or date information before the petition is filed with the filing officer. Individuals or committees seeking to recall elected officials should carefully review S. 9.10(2)(e), Wis. Stats., concerning the validity of signatures on recall petitions.

**Certification of Circulator** - The circulator shall personally present the petition to each signer. The circulator may not leave the petition papers unattended on counters or posted on bulletin boards. After obtaining the signatures, the circulator must complete, sign and date the certification on each page of the petition.

**Page Numbers** - Number each page consecutively, beginning with "1", before submitting to the filing officer. A space for page numbers has been provided in the lower right-hand corner of the form.

**Filing Requirements** - the petition shall be filed no later than 5:00 p.m. on the 60<sup>th</sup> day after registration of the recall committee. After the petition is filed, no name may be added or removed. Any signature obtained before registration or after the appropriate circulation period may not be counted.

**Other Requirements** - Individuals or committees petitioning for recall are subject to campaign finance reporting requirements. S. 11.20(4m), Wis. Stats. Individuals or committees organized to recall elected officials should carefully review S. 9.10, Wis. Stats. If individuals or committees have any questions, they should contact the filing officer of the official to be recalled.

**CAMPAIGN FINANCE REPORT  
STATE OF WISCONSIN**

Is This Report an Amendment:     Yes             No

Instructions for completing schedules are on the back of each schedule.

**COMMITTEE IDENTIFICATION**

Name of Committee

Street Address

City, State and Zip Code

**OFFICE USE ONLY**

GAB ID Number:

Please check if address is different than previously reported, and complete the Campaign Registration Statement in the back of this form.   

**REPORT PERIOD**

January Continuing       Pre-Primary       Spring       Fall       Special       Termination Report  
 July Continuing       Pre-Election      also complete Schedule 4

**SUMMARY OF RECEIPTS AND DISBURSEMENTS**

	Column A This Period	Column B Calendar Year-To-Date
<b>1. RECEIPTS</b>		
1A. Contributions (Including Loans) from Individuals	\$	\$
1B. Contributions from Committees (Transfers-In)	\$	\$
1C. Other Income and Commercial Loans	\$	\$
<b>TOTAL RECEIPTS</b> (Add totals from 1A, 1B and 1C)	\$	\$
<b>2. DISBURSEMENTS</b>		
2A. Gross Expenditures	\$	\$
2B. Contributions to Committees (Transfers-Out)	\$	\$
<b>TOTAL DISBURSEMENTS</b> (Add totals from 2A and 2B)	\$	\$

**CASH SUMMARY**

Cash Balance Beginning of Report	\$
Total Receipts	\$
Subtotal	\$
Total Disbursements	\$
<b>CASH BALANCE END OF REPORT</b>	\$
<b>INCURRED OBLIGATIONS</b> (Balance at the Close of This Period-3A)	\$
<b>LOANS</b> (Balance at the Close of This Period-3B)	\$

*I certify that I have examined this report and to the best of my knowledge and belief it is true, correct and complete.*

Type or Print Name of Candidate or Treasurer	Signature of Candidate or Treasurer	Date:
		Daytime Phone:

**NOTE:** The information on this form is required by ss.11.06, 11.20, Wis. Stats. Failure to provide the information may subject you to the penalties of ss.11.60, 11.61, Wis. Stats.

# Instructions for Completing Summary Page of Form EB-2

Instructions for Completing Schedules are on the Back of Each Schedule

## Committee Identification

- ▶ Print or type the complete name and mailing address of your committee.
- ▶ Enter the committee GAB ID number (the number printed in the upper right corner of the mailing label on the envelope in which the forms were mailed).
- ▶ If the report is an amendment to a previous report filed, check the "yes" box. If the report is NOT an amendment, check the "no" box.

## Name of Report

- ▶ Check the box next to the name of the report being filed, and enter the correct calendar year. For information concerning filing dates and report names, refer to the *Campaign Finance Instruction and Bookkeeping Manual*.

## Summary of Receipts and Disbursements

- ▶ Committees should complete the detailed pages in Schedules 1-A through 3-B before completing this summary section of the report form.

### Receipts

- 1A. Contributions (Including Loans) From Individuals:** Enter the amount of Total Contributions from Individuals (Schedule 1-A) in Column A of the Summary page. Add the amount entered in Column A to contributions previously reported for this calendar year, if any, and enter the amount in Column B, Calendar Year-to-Date.
- 1B. Contributions From Committees (Transfers-In):** Enter the amount from Total Contributions (Transfers-In) Received From Committees (Schedule 1-B) in Column A of the Summary page. Add the amount entered in Column A to contributions previously reported for this calendar year, if any, and enter the amount in Column B, Calendar Year-to-Date.
- 1C. Other Income and Commercial Loans:** Enter the amount of Total Other Income (Schedule 1-C) in Column A. Add the amount entered in Column A to other income previously reported for this calendar year, if any, and enter the amount in Column B, Calendar Year-to-Date.
- Total Receipts:** Add the amounts entered on lines 1-A, 1-B and 1-C, in Column A and enter the total in Total Receipts. Add the amount of Total Receipts previously reported, if any, and enter the amount in Column B, Calendar Year-to-Date.

### Disbursements

- 2A. Gross Expenditures:** Enter the amount from Total Expenditures (Schedule 2-A) in Column A of the Summary page. Add the amount in Column A to expenditures previously reported for this calendar year, if any, and enter the amount in Column B, Calendar Year-to-Date.
- 2B. Contributions to Committees (Transfers-Out):** Enter the amount from Total Contributions (Transfers-Out) Made to Committees (Schedule 2-B) in Column A of the Summary page. Add the amount in Column A to contributions previously reported for this calendar year, if any, and enter the amount in Column B, Calendar Year-to-Date.
- Total Disbursements:** Add the amounts entered on lines 2-A and 2-B in Column A and enter the total in Total Disbursements. Add this amount to Total Disbursements previously reported, if any, and enter the amount in Column B, Calendar Year-to-Date.

## Cash Summary

**Cash Balance Beginning of Report:** If this report is the first report filed by the committee, the cash balance will be zero. If this is not the first report filed by the committee, enter the cash balance from the end of the last report period. The beginning cash balance of a report must *always* be the *same* as the ending cash balance of the prior report.

**Total Receipts:** Enter the amount from Total Receipts in Column A of the Summary page.

**Subtotal:** Add Cash Balance Beginning of Report to Total Receipts and enter the amount.

**Total Disbursements:** Enter the amount from Total Disbursements in Column A of the Summary page.

**Cash Balance End of Report:** Subtract Total Disbursements from Subtotal and enter the amount. The cash balance at the end of the report period should *equal* the reconciled balance in the checking account *plus* any savings or investment accounts.

**Incurred Obligations:** Enter the amount from Total Incurred Obligations (Schedule 3-A) in Column A of the Summary page. Incurred obligations must be carried forward on *each* report until paid in full.

**Loans:** Enter the amount from the Total Outstanding Loans (Schedule 3-B) in Column A of the Summary page. Loans must be carried forward on *each* report until paid in full.

## Sign and Date the Report

The treasurer or candidate must sign and date each report filed. Each report must be complete, correct, and in compliance with the reporting format. Please include a daytime phone number and a contact person if someone other than the treasurer prepares the report.

**RECEIPTS**  
**Contributions (Including Loans) From Individuals**

Complete Committee Name

Instructions for completing schedules are on the back of each schedule.

Date	Full Name, Mailing Address and Zip Code Of Contributor	Occupation Description from list, Name and Address of Principal Place of Employment (if year-to-date total exceeds \$100)	Amount of Contribution
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Conduit <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Conduit <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Conduit <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Conduit <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Conduit <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Conduit <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Conduit <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Conduit <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Conduit <input type="checkbox"/> Loan		
<b>SUBTOTAL ITEMIZED CONTRIBUTIONS THIS PAGE</b>			\$
<b>TOTAL ITEMIZED CONTRIBUTIONS</b>			\$
<b>TOTAL UNITEMIZED CONTRIBUTIONS \$20 OR LESS</b>			\$
<b>TOTAL CONTRIBUTIONS RECEIVED FROM INDIVIDUALS</b>			\$

# Instructions for Completing Schedule 1-A RECEIPTS

## Contributions (Including Loans) From Individuals

### General Instructions:

- ▶ Print or type the complete name of your committee in the box provided.
- ▶ Duplicate as many pages as you will need in order to report contributions, including loans from individuals, on this form.
- ▶ Enter the number of Schedule 1-A pages in the upper right corner of the form.

**Date:** Enter the date (month, day, year) each contribution was **RECEIVED**. *Do not* enter the date that appears on the contributor's check or the date deposited, unless it is the same as the date received (*is in committee's possession and control*).

### **Full Name, Mailing Address, and Zip Code:**

1. For contributions over \$20: Enter the full name and address of the contributor.
2. For single or cumulative contributions totaling over \$100 in a calendar year: Enter the full name and address of the contributor. Enter the **occupation** and the **name and address of principal place of employment**.

**Please refer to the Occupation Description worksheet for occupation type descriptions.**

**Calendar Year-to-Date Total:** Add contributions previously received this calendar year, from this contributor to the contributions received in this report period. The Calendar Year-to-Date Total for an individual must always be entered. The Current Amount and Year-to-Date Total will be identical on the first report period of the calendar year. Once the individual's Calendar Year-to-Date Total exceeds \$100, you must enter the contributor's occupation, and the name and address of the principal place of employment. **Please refer to the Occupation Description worksheet for the contributor's occupation type description.**

**Subtotal Itemized Contributions this page:** Enter the total of all the contributions listed on this page. If additional pages are used, enter the subtotal for each separate page.

**Total Itemized Contributions:** Add the subtotals from all pages of Schedule 1-A. If more than one page, enter the total on only the last page of Schedule 1-A.

**Total Unitemized Contributions \$20 or less:** Enter the total of unitemized contributions of \$20 or less only on the last page of Schedule 1-A.

**Total Contributions Received from Individuals:** Add the **Total Itemized Contributions** to the **Total Unitemized Contributions \$20 or Less** and enter the amount **only** on the last page of Schedule 1-A.

### Special Instructions:

- ◆ Contributions and loans from individuals on Schedule 1-A include any cash, personal or individual loans, purchase of tickets to fundraising events, memberships, gifts, advances, in-kind contributions, and all other personal contributions from an individual **including** the candidate. An in-kind contribution is any goods, property, or services provided to the committee free or for less than the fair market value. (*Volunteer services are not a contribution.*)
- ◆ **In-kind contributions from individuals must also be reported as in-kind expenditures on Schedule 2-A to avoid distortion of the cash balance.**
- ◆ When the contribution is in-kind, a loan, or is received through a conduit, check the appropriate box in the section where the contribution is listed. If you receive a personal check or cash, no box needs to be checked.
- ◆ Contributions from individuals transferred through conduits are reported on Schedule 1-A under the individual contributor's name. The name of the conduit should be listed below the individual contributor information. The transmittal letter accompanying the conduit check, lists the individuals who are the original sources of the contributions. These contributions are subject to itemization on the same basis as other individual contributions; if over \$100, the occupation, name, and address of employer must be provided.
- ◆ Any individual loans, either from the candidate or from another individual, must be reported on Schedule 1-A **and** on Schedule 3-B, Additional Disclosure, Loans, until paid in full.
- ◆ Loans from individuals are subject to individual contribution limits (see Campaign Finance and Bookkeeping Manual).
- ◆ Each contributor's name, address, and amount must be listed separately. Contributions from joint accounts shall be reported as coming from the individual signing the check, **unless the signor indicates otherwise**. If the amount is divided, each individual must be itemized separately. Do not report a contribution as coming from more than one individual.
- ◆ Receipts from raffles, auctions, garage sales, and other similar fundraising events are individual contributions and must be recorded. When receipts consist of single contributions of \$20 or less, please report the amount in Unitemized Receipts of \$20 or Less. Any single contributions that exceed \$20 must be itemized.
- ◆ **Do not** report contributions from political action committees, political party committees, or other candidate committees on Schedule 1-A. These contributions must be reported on Schedule 1-B.

## Occupation Description Worksheet

Occupation Description
Administrative Professional - Administrator
Administrative Professional - Chief Executive
Administrative Professional - Executive
Administrative Professional - Executive Directors/Directors
Administrative Professional - Management/Supervision
Administrative Professional - Telephone
Administrative Professional - Urban & Regional Planners
Arts and Entertainment - Artists
Arts and Entertainment - Athletes/Coaches/Sports Officials
Arts and Entertainment - Entertainers
Arts and Entertainment - Events Coordinator
Arts and Entertainment - Gambling/Gaming and Services
Arts and Entertainment - Management
Arts and Entertainment - Music & Movies
Arts and Entertainment - Photographer
Arts and Entertainment - Production
Arts and Entertainment - Radio
Arts and Entertainment - Television
Arts and Entertainment - Trainers
Arts and Entertainment - Writer/Editor
Agricultural - Cattle Ranchers/Livestock
Agricultural - Crop Production & Basic Processing
Agricultural - Dairy
Agricultural - Equipment
Agricultural - Farming, Forestry, & Fishing
Agricultural - Grain/Feed Operations
Agricultural - Logging, Timber, & Paper Mills
Agricultural - Services & Products
Agricultural - Technicians/Inspectors
Agricultural - Workers
Clergy
Religious Activities/Education
Clerical/Admin Support - Data Entry
Clerical/Admin Support - Information/Record/File Clerks
Clerical/Admin Support - Library Services
Clerical/Admin Support - Receptionists
Clerical/Admin Support - Secretaries
Education - Administration and Support
Education - Faculty University / College
Education - Instructor
Education - Student
Education - Teacher High School
Education - Teacher K through 12
Education - Teacher Pre-Kindergarten
Financial - Accountant/Auditors/Analysts
Financial - Banking
Financial - Brokers

Occupation Description
Financial - Collection
Financial - Consulting
Financial - Economists
Financial - Financial Services
Financial - Foundations, Philanthropists, & Non-Profits
Financial - Insurance
Financial - Statistician/Mathematician/Actuary
Financial - Tellers
Government - Public Office Holder
Government - Public Sector
Government - Correctional Services
Government - Defense & Foreign Policy
Government - Lobbyists/Govt Relations
Government - Political
Government - Postal Services
Government - Protection & Fire
Government - Public Relations
Health Care - Administration
Health Care - Certified Nursing Asst.
Health Care - Chiropractor
Health Care - Consulting/Training
Health Care - Dentist
Health Care - Emergency Services
Health Care - LPN
Health Care - Medical Supplies
Health Care - Nurse/Hygienist/Physicians Asst
Health Care - Optometrist/Ophthalmologist
Health Care - Pharmaceuticals
Health Care - Pharmacist
Health Care - Physical/Occupational Therapy
Health Care - Physicians
Health Care - Psychologist/Psychiatrist/Counseling
Health Care - Social Worker
Health Care - Other Technicians/Assistants/Specialists
Health Care - Midwife
Legal - Arbitration/Mediation Services
Legal - Attorney/Lawyers
Legal - Investigation
Legal - Judicial Services
Legal - Legal Assistant
Legal - Paralegal
Legal - Policy Analysts
Media - Broadcast Tech/ Press
Media - Newspaper/Magazine
Media - Radio
Media - Television
Media - Writer/Editor
Manufacturing - Administrative and Executive
Manufacturing - Assembly Workers
Manufacturing - Automotive

Occupation Description
Manufacturing - Chemical & Related
Manufacturing - Clothing
Manufacturing - Food
Manufacturing - Gas & Oil
Manufacturing - Laborers
Manufacturing - Machine/Equipment Operators
Manufacturing - Manual Workers
Manufacturing - Mining
Manufacturing - Pharmaceuticals
Manufacturing - Steel
Manufacturing - Textiles
Manufacturing - Tobacco
Other - Homemaker
Other - Retired
Other - Unemployed
Other - Student
Real Estate - Broker
Real Estate - Realtor
Real Estate - Administrative
Real Estate - Developer
Religious Activities/Education
Sales & Marketing - Advertising
Sales & Marketing - Auto Dealer Domestic
Sales & Marketing - Auto Dealer Imports
Sales & Marketing - Auto Parts Supply
Sales & Marketing - Customer Service
Sales & Marketing - Public Relations
Sales & Marketing - Purchasing Agents/Buyers
Sales & Marketing - Retail/Sales
Science & Technology - Alternative Energy Production & Services
Science & Technology - Analysts
Science & Technology - Anthropology and Archeology
Science & Technology - Biologists
Science & Technology - Cable & Satellite TV Production & Distribution
Science & Technology - Chemists
Science & Technology - Communication/Electron Equipment
Science & Technology - Communications
Science & Technology - Database Administrators/Specialists
Science & Technology - Computer Programmers/Analysts
Science & Technology - Computer Software
Science & Technology - Computer/Systems Specialists
Science & Technology - Computers/Internet
Science & Technology - Energy & Natural Resources
Science & Technology - Lab Assistants
Science & Technology - Marine Life Services
Science & Technology - Reproduction Specialists/Breeders
Science & Technology - Researchers
Science & Technology - Scientists



Occupation Description
Science & Technology - Technicians
Science & Technology - Utilities
Science & Technology - Veterinary Services/Animal Control
Science & Technology - Zoology Services
Skilled Trades - Airline Pilot
Skilled Trades - Architect/Surveyor
Skilled Trades - Automotive Technicians
Skilled Trades - Carpentry/Woodworking
Skilled Trades - Construction Services
Skilled Trades - Construction, General Contractor
Skilled Trades - Construction, Materials & Equipment
Skilled Trades - Electricians
Skilled Trades - Drafters & Engineers
Skilled Trades - Masonry
Skilled Trades - Mechanics/Repair
Skilled Trades - Plumbing & Pipe-fitting
Skilled Trades - Welding
Service - Activities Coordinator
Service - Beauty/Grooming
Service - Child Care
Service - Clerks/Cashiers
Service - Cruise Line
Service - Delivery Services
Service - Domestic Helper/Companion
Service - Fireman
Service - Food/Beverage
Service - Funeral Services
Service - Home Maintenance & Repair
Service - Hotel
Service - Housekeeping/Janitorial
Service - Home Design and Landscaping
Service - Pest Control
Service - Police
Service - Protective/Armed Services
Service - Dispatch
Service - Transportation
Service - Travel/Tourism
Service - Waste Management
Service - Worker
Service - Physical Fitness & Training
Service - Staffing Services
Transportation - Administration and Executive
Transportation - Air Traffic Control
Transportation - Airline Pilot
Transportation - Truck Driver
Transportation - Railroad

**SCHEDULE 1-B**

**RECEIPTS**  
**Contributions from Committees**  
**(Transfers-In)**

Complete Committee Name

Instructions for completing schedules are on the back of each schedule.

Date	Full Name of Committee, Mailing Address and Zip Code	Committee GAB ID Number	Amount of Contribution
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
<b>SUBTOTAL CONTRIBUTIONS (Transfers-In) THIS PAGE</b>			\$
<b>TOTAL CONTRIBUTIONS (Transfers-In) RECEIVED FROM COMMITTEES</b>			\$

# Instructions for Completing Schedule 1-B RECEIPTS

## Contributions From Committees (Transfers-In)

### General Instructions:

- ▶ Print or type the complete name of your committee in the box provided.
- ▶ Duplicate as many pages as you will need in order to report contributions from committees (transfers-in) on this form.
- ▶ Enter the number of Schedule 1-B pages in the upper right corner of the form.
- ▶ Each contribution received from a committee **must be itemized** regardless of the amount.

### **Date:**

Enter the date (month, day, year) each contribution was received. **DO NOT** enter the date which appears on the contributor's check or the date deposited, unless it is the same as the date received.

### **Complete Name and Address of Committee:**

Enter the full name and address of each contributor. The seven-digit GAB ID number of each committee registered with the state should appear on their check. A listing of all committees registered with the state is available on the Government Accountability Board website (<http://gab.wi.gov>). Please provide this number for all contributions from committees.

### **Amount:**

Enter the amount of the contribution this period.

### **Calendar Year-to-Date Total:**

Add contributions previously received this calendar year, from this committee to the contributions received in this report period. The Calendar Year-to-Date Total for a committee must always be entered. The Current Amount and Year-to-Date Total will be identical on the first report period of the calendar year.

### **Subtotal Contributions (Transfers-In) This Page:**

Enter the total of all the contributions (transfers-in) listed on this page. If additional pages are needed, enter the subtotal for each separate page.

### **Total Contributions (Transfers-In) Received from Committees:**

Add the subtotals from all pages of Schedule 1-B. If more than one page, enter the total on only the last page of Schedule 1-B.

### Special Instructions:

- ◆ Contributions transferred through **conduits** are reported as **individual contributions** on Schedule 1-A.
- ◆ In reporting contributions from committees, provide the *complete* name and address of each committee making a contribution. The seven-digit GAB ID number of each committee registered with the state should appear on their check. Please provide this number for all contributions from committees.
- ◆ Contributions From Committees (Transfers-In) consist of any funds received from a political party committee, political action committee, political group (referenda), candidate committee or a legislative campaign committee.
- ◆ In-kind contributions from a committee must also be reported as an in-kind offset in Schedule 2-A to avoid distortion of the cash balance. An in-kind contribution is any goods, service, or property provided to the committee free or for less than the fair market value. (*Volunteer services are not a contribution.*)
- ◆ When the contribution is in-kind, check the in-kind box in the section where the contribution is listed.
- ◆ Contributions received from a sole proprietorship or partnership must be reported as individual contributions in Schedule 1-A. You must verify that the original source of the contribution is from personal funds. Contributions from partnerships must reflect the partners' share in the partnership unless otherwise specified.
- ◆ Contributions may not be accepted from corporations (including LLC), cooperatives, or associations.



# Instructions for Completing Schedule 1-C RECEIPTS

## Other Income and Commercial Loans

### General Instructions:

- ▶ Print or type the complete name of your committee in the box provided.
- ▶ Duplicate as many pages as you will need in order to report other income and commercial loans on this form.
- ▶ Enter the number of Schedule 1-C pages in the upper right corner of the form.

### **Date:**

Enter the date (month, day, year) other income and commercial loans were RECEIVED.

### **Full Name, Mailing Address and Zip Code of Source of Income:**

Identify the source of income by providing the name and address of the commercial lending institution. Provide the name and address of any person or business from which other income was received.

### **Describe Type of Income:**

Describe the type of income, e.g., loan from commercial lender for campaign expenses, refund from utility, refund of over-payment to a vendor, interest on savings, or returned or lost contribution checks previously listed on Schedule 2-B, etc. Use more than one box or attach an additional sheet if needed.

### **Amount:**

Enter the amount of other income and commercial loans of more than \$20 for this period only.

### **Subtotal Other Income This Page:**

Enter the total of all the other income itemized on this page. If additional pages are used, enter the subtotal for each separate page.

### **Total Itemized Other Income:**

Add the subtotals from all pages of Schedule 1-C. If more than one page, enter the total on only the last page of Schedule 1-C.

### **Total Unitemized Other Income \$20 or less:**

Enter the total of unitemized other income of \$20 or less on the last page of Schedule 1-C.

### **Total Other Income:**

Add the Total Itemized Other Income to the Total Unitemized Other Income of \$20 or Less and enter the amount on only the last page of Schedule 1-C.

### Special Instructions:

- ◆ Personal loans from individuals (including the candidate) must be reported on Schedule 1-A.
- ◆ Other income and commercial loans include loans received from any financial institution. Loans must also be listed on Schedule 3-B, Additional Disclosure-Loans, until paid in full.
- ◆ When a contribution given by your committee to another committee is returned to you, report the receipt of the returned contribution in this schedule. Please indicate (under the Type of Income box) the original date your contribution was given.
- ◆ When a loan from a commercial lending institution is guaranteed by individuals, the full name and mailing address of each guarantor and the balance of the amount guaranteed by each guarantor at the end of the reporting period must be reported on Schedule 3-B. The amount of the guarantee is considered a contribution from the guarantor and subject to individual contribution limits until the amount is repaid to the lending institution.
- ◆ Other income includes refunds and interest received. Receipts from fundraising events (auctions, dinners, etc.) and from the sale of commercial items for the purpose of raising funds for political purposes are contributions and must be reported on Schedule 1-A or 1-B.

**SCHEDULE 2-A**

**DISBURSEMENTS**  
Gross Expenditures

Complete Committee Name

Instructions for completing schedules are on the back of each schedule.

Date	Full Name, Mailing Address and Zip Code Of Person or Business to Whom Payment Is Made	Specific Purpose of Expenditure	Amount
	Check If: <input type="checkbox"/> In-Kind Offset		
	Check If: <input type="checkbox"/> In-Kind Offset		
	Check If: <input type="checkbox"/> In-Kind Offset		
	Check If: <input type="checkbox"/> In-Kind Offset		
	Check If: <input type="checkbox"/> In-Kind Offset		
	Check If: <input type="checkbox"/> In-Kind Offset		
	Check If: <input type="checkbox"/> In-Kind Offset		
	Check If: <input type="checkbox"/> In-Kind Offset		
	Check If: <input type="checkbox"/> In-Kind Offset		

SUBTOTAL ITEMIZED EXPENDITURES THIS PAGE \$

TOTAL ITEMIZED EXPENDITURES \$

TOTAL UNITEMIZED EXPENDITURES \$20 OR LESS \$

TOTAL EXPENDITURES \$

# Instructions for Completing Schedule 2-A

## DISBURSEMENTS

### Gross Expenditures

#### General Instructions:

- ▶ Print or type the complete name of your committee in the box provided.
- ▶ Duplicate as many pages as you will need in order to report gross expenditures on this form.
- ▶ Enter the number of Schedule 2-A pages in the upper right corner of the form.

**Date:** Enter the date (month, day, year) the disbursement was made.

**Full Name, Mailing Address, and Zip Code of Person or Business to Whom Payment Is Made:** Enter the name and complete address of the person or business to whom payments were made.

**Specific Purpose of Expenditure:** Enter the specific purpose of the expenditure. Expenditures must be made for **political purposes only**. An expenditure is for a political purpose when it influences the election or nomination for election of any individual to federal, state or local office. A complete description of the type of expenditure or reimbursement must be given (i.e., food for fundraiser or campaign T-shirts for resale). **Please refer to the Expense Types worksheet for expense type descriptions.** You may use more than one box or attach an additional sheet if needed.

**Subtotal Itemized Expenditures This Page:** Enter the total of all the expenditures listed on this page. If additional pages are used, enter the subtotal for each separate page.

**Total Itemized Expenditures:** Add the subtotals from all pages of Schedule 2-A. If more than one page, enter the total itemized on only the last page of Schedule 2-A.

**Total Unitemized Expenditures \$20 or less:** Enter the total of unitemized expenditures of \$20 or less on only the last page of Schedule 2-A. Note: If you itemize expenditures of \$20 or less, **DO NOT** include those amounts **again** in the total of unitemized expenditures.

**Total Expenditures:** Add the Total Itemized Expenditures to the Total Unitemized Expenditures (\$20 or less), and enter the amount on the last page of Schedule 2-A.

#### Special Instructions:

- ◆ Only expenditures of **more than \$20** must be itemized. Expenditures of **\$20 or less** should be totaled and reported as unitemized expenditures.
- ◆ Expenditures for general services, such as consulting, data processing, or reimbursement, should be broken down into the specific services rendered, e.g., salary, travel, data entry, polling. **Please refer to the Expense Types worksheet for specific expenditure descriptions.**
- ◆ In-kind contributions reported in Schedule 1-A or 1-B, must also be reported as in-kind offsets in Schedule 2-A.
- ◆ Expenditures incurred for in-kind contributions to other registrants must be reported in Schedule 2-B, **NOT** 2-A. See instructions on Schedule 2-B.
- ◆ All expenditures must be made from the campaign depository and must be used for political purposes only.
- ◆ It is permissible for a candidate or an agent of a committee to pay for items from personal funds as long as receipts are submitted to the treasurer for reimbursement from the depository. Reporting of a reimbursement must include information that describes the nature of the original expenditure.
- ◆ It is permissible to maintain a petty cash account to pay for minor items provided that funds for the petty cash account are drawn from the campaign depository and that a record of the transactions is kept. Expenditures over \$20 must be paid by negotiable instrument, and be itemized on the report. Expenditures under \$20 may be included in unitemized expenditures. If itemized, the purpose of each expenditure must be provided. *Only the specific expenditures are reported. Do not report the check for setting up the petty cash account or any checks written to replenish petty cash.*
- ◆ Contributions received, deposited, and later returned to the original contributor must be reported as an expense in Schedule 2-A and in Schedule 3-E.
- ◆ **Independent expenditures** made by committees filing the Oath for Committees and Individuals Making Independent Disbursements (EB-6) must be reported in Schedule 2-A and itemized on the Report of Independent Disbursements (EB-7).

## Expense Type Descriptions

Expense Type
Administrative Expenses
Bank Charges
Contribution to Committee
Contribution to Charity
Charitable Donation
Candidate Expenses - Clothing
Candidate Expenses - Gas
Candidate Expenses - Meals
Candidate Expenses - Mileage
Candidate Expenses - Parking
Candidate Expenses - Travel
Consulting Fees - Media
Consulting Fees - General
Data Conversion
Fundraiser - Entertainment
Filing Fee
Fundraiser - Food & Beverage
Fundraiser - Hall Rental
Gifts
Internal Communication with Members
Interest
IT - Campaign Computer Equipment
IT - Campaign IT Maintenance
IT - Campaign Software
Legal Fees - Plaintiff Libel Suits
Legal Fees - Campaign Misinformation
Loan Payment - Personal Loan
Loan Payment - Commercial Loan
Membership Dues - Charitable Org
Membership Dues to Professional Orgs
Membership Dues - Political Org
Media - Billboards / Outdoor Advertising
Media - Issue Ads
Media - Newspaper
Media - Radio
Media - TV
Meeting Expenses
Mailing List
Membership pins / awards
Capitol Office Expenses
Office Furniture
Office - Campaign Office Maintenance
Office Rent
Office Supplies
Professional - Accounting
Printing - Brochures
Parade Expenses - Fees, candy
Phone Bank
Printing Misc. (buttons, bumper stickers, t-shirts)
Postage



**Expense Type**

Printing - Yard Signs  
Returned Contribution  
Solicitation Expenses  
Sales Tax  
Survey/Polls  
Tickets to Events  
Utilities - Electrical  
Utilities - Gas  
Utilities - Internet Access  
Utilities - Phone / Cell Phone  
Media - Website Development  
Volunteer Meals  
Wages - Campaign Manager  
Wages - Capitol Office Staff  
Wages - Campaign Staff  
Wages - Employment Taxes

**SCHEDULE 2-B**

**DISBURSEMENTS**  
**Contributions To Committees**  
**(Transfers-Out)**

Complete Committee Name

Instructions for completing schedules are on the back of each schedule.

Date	Full Name, Mailing Address and Zip Code	Committee GAB ID Number	Amount
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
	Check If: <input type="checkbox"/> In-Kind <input type="checkbox"/> Loan		
<b>SUBTOTAL CONTRIBUTIONS (Transfers-Out) THIS PAGE</b>			\$
<b>TOTAL CONTRIBUTIONS (Transfers-Out) MADE TO COMMITTEES</b>			\$

# Instructions for Completing Schedule 2-B

## DISBURSEMENTS Contributions to Committees

### General Instructions:

- ▶ Print or type the complete name of your committee in the box provided.
- ▶ Duplicate as many pages as you will need in order to use this form to report Contributions to Committees (Transfers-Out). Enter the number of Schedule 2-B pages in the upper right corner of the form.
- ▶ Each contribution made to another committee **must be itemized regardless of the amount.**

### **Date:**

Enter the date (month, day, year) that each contribution was made to another committee.

### **Complete Name and Address of Committee:**

Enter the full name and address of each committee. Please provide the seven-digit GAB ID number of each committee registered with the state. This ID number is available on the elections board website (<http://gab.wi.gov>).

### **Amount:**

Enter the amount of the contribution given in this period.

### **Calendar Year-to-Date Total:**

Add contributions previously given this calendar year to this committee, to the contributions given in this report period. The Calendar Year-to-Date Total for a committee must always be entered. The Current Amount and Year-to-Date Total will be identical on the first report period of the calendar year.

### **Subtotal Contributions (Transfers-Out) This Page:**

Enter the total of all the contributions (Transfers-Out) listed on this page. If additional pages are used, enter the subtotal for each separate page.

### **Total Contributions (Transfers-Out) Made to Committees:**

Add the subtotals from all pages of Schedule 2-B. If more than one page, enter the total on only the last page of Schedule 2-B.

### Special Instructions:

- ◆ If a contribution is made to a candidate for local office, please print the word "Local" in the space for the ID#. This would include candidates for municipal, school district, and county office. Note: District Attorney and Circuit Court Judge are considered state offices.
- ◆ Contributions to Committees (Transfers-Out) consist of any funds contributed to a political party committee, political action committee, political group (referenda), candidate committee, or legislative campaign committee.
- ◆ When the contribution is in-kind, check the in-kind box in the section where the contribution is listed.
- ◆ When the contribution is a loan, check the loan box in the section where the contribution is listed.
- ◆ For each in-kind contribution, the name and address of the candidate or committee receiving the contribution must be listed, along with the name and address of the person or business to whom payment was made and the amount and date of the in-kind contribution.
  1. *An in-kind contribution of property made during the same report period in which it was acquired, need only be reported on Schedule 2-B.*
  2. *An in-kind contribution consisting of property acquired in a prior report period and reported as an expenditure on the previous report, must be removed from expenditures by making a negative entry for the value of the property on Schedule 2-A, as well as the entry for the contribution on Schedule 2-B. This will avoid double reporting of the expense.*

**SCHEDULE 3-A**

**Incurred Obligations Excluding Loans  
ADDITIONAL DISCLOSURE**

Complete Committee Name

Instructions for completing schedules are on the back of each schedule.

		Outstanding Obligations Beginning This Period	New Obligations or Additions This Period	Cumulative Payments This Period	Outstanding Obligations At Close of This Period	Office Use Only
Date / /	Full Name, Mailing Address and Zip Code of Creditor					
		Nature of Debt (Purpose)				
Date / /	Full Name, Mailing Address and Zip Code of Creditor					
		Nature of Debt (Purpose)				
Date / /	Full Name, Mailing Address and Zip Code of Creditor					
		Nature of Debt (Purpose)				
Date / /	Full Name, Mailing Address and Zip Code of Creditor					
		Nature of Debt (Purpose)				
Date / /	Full Name, Mailing Address and Zip Code of Creditor					
		Nature of Debt (Purpose)				
Date / /	Full Name, Mailing Address and Zip Code of Creditor					
		Nature of Debt (Purpose)				
Date / /	Full Name, Mailing Address and Zip Code of Creditor					
		Nature of Debt (Purpose)				
Date / /	Full Name, Mailing Address and Zip Code of Creditor					
		Nature of Debt (Purpose)				
		<b>SUBTOTAL ITEMIZED OBLIGATIONS THIS PAGE</b>				\$
		<b>TOTAL ITEMIZED OBLIGATIONS</b>				\$
		<b>TOTAL UNITEMIZED OBLIGATIONS \$20 OR LESS</b>				\$
		<b>TOTAL INCURRED OBLIGATIONS</b>				\$

# Instructions for Completing Schedule 3-A

## Incurred Obligations Excluding Loans

### ADDITIONAL DISCLOSURE

#### **General Instructions:**

- ▶ Print or type the complete name of your committee in the box provided.
- ▶ Duplicate as many pages as you will need in order to report incurred obligations on this form.
- ▶ Enter the number of Schedule 3-A pages in the upper right corner of the form.

**Date:** Enter the date (month, day, year) the obligation was incurred.

#### **Full Name, Mailing Address, and Zip Code of Creditor:**

Enter the complete name and address of the creditor.

#### **Nature of Debt (Purpose):**

Describe the specific purpose for which the obligation was incurred (See Schedule 2-A for instructions).

#### **Balance Columns:**

In the first column, enter the amount, if any, at the beginning of this report period. If this is a new obligation, there is no beginning balance. If this is an existing obligation, the beginning balance should equal the previous report period's closing balance. In the second column, enter the amount of any new obligations or additions to existing obligations. In the third column, enter any payments made this report period (payments this period must also be reported in Schedule 2-A). In the fourth column, enter the outstanding balance at the close of this report period. Note: If there is a remaining balance, it must be carried forward to the next report's beginning balance.

#### **Subtotal Itemized Obligations:**

Enter the total of all the incurred obligations listed on this page. If additional pages are used, enter the subtotal for each separate page.

#### **Total Itemized Obligations:**

Add the subtotals from all pages of Schedule 3-A. If more than one page, enter the total on only the last page of Schedule 3-A.

#### **Total Unitemized Obligations \$20 or less:**

Enter the total unitemized obligations of \$20 or less on only the last page of Schedule 3-A.

#### **Total Incurred Obligations:**

Add the Total Itemized Obligations to the Total Unitemized Obligations \$20 or Less and enter the amount on only the last page of Schedule 3-A.

#### **Special Instructions:**

- ◆ Incurred obligations are to be reported when an enforceable agreement has been reached. If the exact amount of the obligation has not yet been defined then the amount of the obligation must be estimated. Although the committee may not have received a bill, the amount recorded should be a good faith estimate of the amount owed.
- ◆ The balance of all incurred obligations should be reported from the time incurred until paid in full.
- ◆ Each obligation must be carried forward on subsequent reports until the obligation has been reduced to zero.
- ◆ When a payment is made on an obligation, the transaction should be reported as a payment on Schedule 3-A and as an expenditure on Schedule 2-A.
- ◆ If the committee has a dispute over the amount owed to a vendor, this must be noted in the "purpose".

**Loans  
Individual, Committee or Commercial  
ADDITIONAL DISCLOSURE**

Complete Committee Name

Instructions for completing schedules are on the back of each schedule.

Date / /	Full Name, Mailing Address and Zip Code of Loan Source	Outstanding Obligations Beginning of This Period	New Loans This Period	Cumulative Payments This Period	Outstanding Obligations End of This Period

List All Endorsers or Guarantors (if any)

Full Name, Mailing Address and Zip Code of Guarantor	Occupation
	Name and Address of Employer
	Amount Guaranteed Outstanding \$
Full Name, Mailing Address and Zip Code of Guarantor	Occupation
	Name and Address of Employer
	Amount Guaranteed Outstanding \$

Date / /	Full Name, Mailing Address and Zip Code of Loan Source	Outstanding Obligations Beginning of This Period	New Loans This Period	Cumulative Payments This Period	Outstanding Obligations End of This Period

List All Endorsers or Guarantors (if any)

Full Name, Mailing Address and Zip Code of Guarantor	Occupation
	Name and Address of Employer
	Amount Guaranteed Outstanding \$
Full Name, Mailing Address and Zip Code of Guarantor	Occupation
	Name and Address of Employer
	Amount Guaranteed Outstanding \$

Date / /	Full Name, Mailing Address and Zip Code of Loan Source	Outstanding Obligations Beginning of This Period	New Loans This Period	Cumulative Payments This Period	Outstanding Obligations End of This Period

List All Endorsers or Guarantors (if any)

Full Name, Mailing Address and Zip Code of Guarantor	Occupation
	Name and Address of Employer
	Amount Guaranteed Outstanding \$
Full Name, Mailing Address and Zip Code of Guarantor	Occupation
	Name and Address of Employer
	Amount Guaranteed Outstanding \$

SUBTOTAL OUTSTANDING LOANS THIS PAGE

\$

TOTAL OUTSTANDING LOANS

\$

# Instructions for Completing Schedule 3-B

## Loans – Individual, Committee or Commercial

ADDITIONAL DISCLOSURE

### **General Instructions:**

- ▶ Print or type the complete name of your committee in the box provided.
- ▶ Duplicate as many pages as you will need in order to report loans on this form.
- ▶ Enter the number of Schedule 3-B pages in the upper right corner of the form.

### **Date:**

Enter the date (month, day, year) the loan was made.

### **Full Name, Mailing Address, and Zip Code of Loan Source:**

Enter the complete name and address of the loan source.

### **Balance Columns:**

In the first column, enter the actual amount at the beginning of this reporting period. If this is a new loan, the outstanding beginning balance is zero and the amount of the loan is recorded under the section "New Loans This Period". If this is an existing loan, the outstanding beginning balance should equal the previous report period's closing (outstanding) balance. In the third column, enter any payments made during this report period (payments made this period must also be reported in Schedule 2-A). In the fourth column, enter the outstanding balance at the end of this report period. Note: If there is a remaining balance, it must be carried forward to the next report's beginning balance.

### **List All Endorsers or Guarantors (If Any):**

In the space provided on the form, provide the full name, mailing address and zip code of any guarantors of loans. Enter the amount guaranteed which is outstanding at the end of the reporting period for each guarantor. See the notes below on how to apportion loan guarantees. If the amount guaranteed exceeds \$100, enter the guarantor's occupation, name and address of principal place of employment.

### **Special Instructions:**

- ◆ A loan guarantee is considered a contribution from the guarantor until the loan is repaid.
- ◆ If more than one person guarantees a loan, the amount of the loan is assigned to the guarantors in equal shares, in the proportion that the guarantors bear to the total amount guaranteed unless a different share is specified in the loan instrument.
- ◆ When a payment which reduces the unpaid balance of the loan is made to the lending institution, the amount assigned to each guarantor is reduced in equal shares, unless a different share is specified in the loan instrument.
- ◆ The outstanding amount of a loan or loan guarantee plus the total contributions to the campaign by the guarantor may not exceed the individual contribution limit.
- ◆ Any reductions in loans which are not offset by expenditures in Schedule 2-A must be explained (e.g., candidate forgives self loans).

**SCHEDULE 4****TERMINATION REQUEST**

Complete Committee Name

GAB ID Number

- A committee may terminate its registration and reporting requirements if the committee will no longer receive contributions, make disbursements or incur obligations, and the cash balance and obligations have been reduced to zero.
- Candidates may not terminate prior to the election in which they are participating.
- Non-candidate committees registered with the state must pay the \$100 filing fee if they have over \$2500 in total disbursements for the calendar year.
- Please read carefully and, if necessary, indicate how residual committee funds have been disposed of or if outstanding loans or obligations have been forgiven. Sign and date the termination request at the bottom of this page.
- Make sure the termination box on the cover page of this report is checked.
- Please note: An audit must be completed and all obligations with the Board, including settlement offers, fulfilled before termination can be granted. All records must be maintained until termination is granted.

**DISPOSAL OF RESIDUAL FUNDS***THIS INFORMATION SHOULD ALSO BE INCLUDED ON SCHEDULE 2-A AND/OR 2-B.*

Date	Recipient	Amount

**LOAN OR DEBT FORGIVENESS***I hereby forgive all personal loans or have assumed responsibility for any and all debts of my campaign committee.*

Date	Endorser, Guarantor, or Creditor	Amount

TERMINATION REQUEST. I hereby request that the committee registration be terminated. I declare that the committee has not incurred any obligations and does not anticipate incurring any. The committee does not anticipate receiving any further contributions or making any disbursements. I further state that the cash balance has been reduced to zero and that all remaining funds have been disposed of in the manner prescribed by law.

\_\_\_\_\_  
Signature of Candidate or Treasurer\_\_\_\_\_  
Date



FOR OFFICE USE ONLY

# DECLARATION OF CANDIDACY

(See instructions for preparation on back)

Is this an amendment?  Yes  No

I, \_\_\_\_\_, being duly sworn, state that  
(Candidate's name)

I am a candidate for the office of \_\_\_\_\_  
(Official name of office - Include district, branch or seat number)

representing \_\_\_\_\_  
(Name of political party or statement of principle - five words or less)

and I meet or will meet at the time I assume office the applicable age, citizenship, residency and voting qualification requirements, if any, prescribed by the constitutions and laws of the United States and the State of Wisconsin, and that I will otherwise qualify for office, if nominated and elected.

I have not been convicted of a felony in any court within the United States for which I have not been pardoned.<sup>1</sup>

My present municipality of residence for voting purposes is:

\_\_\_\_\_  
(Candidate's address for voting purposes - Include the number, street, and municipality where the candidate resides.)

My name as I wish it to appear on the official ballot is as follows:

\_\_\_\_\_  
(Any combination of first name, middle name or initials with surname. A nickname may replace a legal name.)

\_\_\_\_\_  
(Signature of candidate)

STATE OF WISCONSIN )  
County of \_\_\_\_\_ ) ss.  
(County of notarization)

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

\_\_\_\_\_  
(Signature of person authorized to administer oaths)

NOTARY SEAL  
NOT REQUIRED

My commission expires \_\_\_\_\_ or  is permanent.

Notary Public or \_\_\_\_\_  
(Official title if not a notary)

GAB-162 (Rev. 4/2009) The information on this form is required by §8.21, Stats., Art. XIII, Sec. 3, Wis. Const., and must be filed with the filing officer in order to have a candidate's name placed on the ballot. §§8.05 (1)(j), 8.10 (5), 8.15 (4)(b), 8.17 (2), 8.20 (6), 120.06 (6)(b), Wis. Stats.

This form is prescribed by the GOVERNMENT ACCOUNTABILITY BOARD, 212 East Washington Avenue, 3<sup>rd</sup> Floor, P.O. Box 7984, Madison, WI 53707-7984

1. A 1996 constitutional amendment bars any candidate convicted of a misdemeanor which violates the public trust from running for or holding a public office. However, the legislature has not defined which misdemeanors violate the public trust. A candidate convicted of any misdemeanor is not barred from running for or holding a public office until the legislature defines which misdemeanors apply.

## Instructions for Completing the Declaration of Candidacy

All candidates seeking ballot status for election to any office in the State of Wisconsin must properly complete and file a *Declaration of Candidacy*. This form must be **ON FILE** with the proper filing officer no later than the deadline for filing nomination papers or the candidate's name will not appear on the ballot. A facsimile will be accepted if the FAX copy is received by the filing officer no later than the filing deadline and the signed original declaration is received by the filing officer with a postmark no later than the filing deadline.

### *Information to be provided by the candidate:*

- Type or print your name on the first line.
- The title of the office and any district, branch, or seat number for which you are seeking election must be inserted on the second line. *For legislative offices insert the title and district number, for district attorneys insert the title and the county, for circuit court offices insert the title, county and branch number, and for municipal and school board offices insert the title and any district or seat number.*
- Type or print the political party affiliation or principle supported by you in five words or less on the third line. *Nonpartisan candidates may leave this line blank.*
- **Felony convictions:** Your name cannot appear on the ballot if you have been convicted of a felony in any court in the United States for which you have not been pardoned. Please see footnote on page 1 for further information with respect to convictions for misdemeanors involving a violation of public trust. *These restrictions only apply to candidates for state and local office.*
- Your current municipality of residence for voting purposes must be inserted on the fourth line. This must include the street and number, or post office address, and the name of the municipality of residence (town, village, or city). If your address changes before the election, an amended Declaration of Candidacy must be filed with the filing officer. s.8.21, Stats. *Federal candidates do not have to provide this information.*
- Type or print your name on the fifth line as you want it to be printed on the official ballot. You may use your full legal name, or any combination of first name, middle name, and initials, or nickname with last name.

The Government Accountability Board has determined that, absent any evidence of an attempt to manipulate the electoral process, candidates are permitted to choose any form of their name, including nicknames, by which they want to appear on the ballot.

No titles are permitted. In addition, names such as "Red" or "Skip" are permitted, but names which have an apparent electoral purpose or benefit, such as "Lower taxes," "None of the above" or "Lower Spending" are not permitted. It is also not permissible to add nicknames in quotes or parentheses between first and last names. For example, John "Jack" Jones or John (Jack) Jones are not acceptable, but John Jones, Jack Jones or John Jack Jones are acceptable.

This form must be sworn to and signed in the presence of a notary public or other person authorized to administer oaths, such as a county or municipal clerk.

### *Information to be provided by the person administering the oath:*

- The county of notarization.
- The date the Declaration of Candidacy was signed and the oath administered.
- The signature and title of the person administering the oath. If signed by a notary public, the date the notary's commission expires must be listed. *The notary seal is not required.*

All candidates for offices using the nomination paper process and all school district candidates must file this form with the appropriate filing officer no later than the deadline for filing nomination papers. §§ 8.10 (5), 8.15 (4)(b), 8.17 (2), 8.20 (6), 8.50 (3)(a), 120.06 (6)(b), Wis. Stats.

Candidates nominated for local office at a caucus must file this form with their municipal clerk within 5 days of receiving notice of nomination. § 8.05 (1)(j), Wis. Stats.

## NOMINATION PAPER FOR NONPARTISAN OFFICE

Candidate's name; no titles may be used.			Street, fire, or rural route number; box number (if rural route); and name of street or road			
Name of municipality for voting purposes <input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	Name of municipality for mailing purposes	State <b>WI</b>	zip code	Type of election <input type="checkbox"/> spring <input type="checkbox"/> special	Election date	
Title of office		<input type="checkbox"/> Branch <input type="checkbox"/> District <input type="checkbox"/> Seat	Branch district or seat number		Name of jurisdiction or district in which candidate seeks office	

I, the undersigned, request that the candidate, whose name and address are listed above, be placed on the ballot at the election described above as a candidate so that voters will have the opportunity to vote for  him or  her for the office listed above. I am eligible to vote in the jurisdiction or district in which the candidate named above seeks office. I have not signed the nomination paper of any other candidate for the same office at this election.

THE MUNICIPALITY USED FOR MAILING PURPOSES, WHEN DIFFERENT THAN MUNICIPALITY OF RESIDENCE, IS NOT SUFFICIENT. THE NAME OF THE MUNICIPALITY OF RESIDENCE MUST ALWAYS BE LISTED.			
SIGNATURES OF ELECTORS	STREET & NUMBER OR RURAL ROUTE <small>Rural address must also include box or fire no.</small>	MUNICIPALITY OF RESIDENCE <small>Indicate Town, Village, or City</small>	DATE OF SIGNING
1.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
2.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
3.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
4.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
5.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
6.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
7.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
8.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
9.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
10.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	

### CERTIFICATION OF CIRCULATOR

I, \_\_\_\_\_, certify:  
(Name of circulator)

I reside at \_\_\_\_\_  
(Circulator's residence - Include number, street, and municipality.)

I personally circulated this nomination paper and personally obtained each of the signatures on this paper. I know that the signers are electors of the jurisdiction or district the candidate seeks to represent. I know that each person signed the paper with full knowledge of its content on the date indicated opposite his or her name. I know their respective residences given. I intend to support this candidate. I am aware that falsifying this certification is punishable under §12.13(3)(a), Wis. Stats.

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Signature of circulator)

## INSTRUCTIONS FOR PREPARING NOMINATION PAPERS FOR NONPARTISAN OFFICE

This is a sample nomination paper form. It conforms to the statutory requirements for nomination papers for nonpartisan office. All information concerning the candidate must be completed in full before circulating this form to obtain signatures of electors. All information concerning the signing electors and the circulator must be completed in full before filing with the appropriate filing officer. This form may be reproduced in any way. A candidate's picture and biographical data may also be added to this form. The Government Accountability Board has determined that no disclaimer or other attribution statement is required on nomination papers.

**Page Numbers** – Number each page consecutively, beginning with “1”, before submitting to the filing officer. A space for page numbers has been provided in the lower right-hand corner of the form.

**Candidate's Name** - Insert the candidate's name. A candidate may use his or her full legal name, or any combination of first name, middle name, and initials or nickname with last name. The Government Accountability Board has determined that, absent any evidence of an attempt to manipulate the electoral process, candidates are permitted to choose any form of their name, including nicknames, by which they want to appear on the ballot.

No titles are permitted. In addition, names such as “Red” or “Skip” are permitted, but names which have an apparent electoral purpose or benefit, such as “Lower taxes,” “None of the above” or “Lower Spending” are not permitted. It is also not permissible to add nicknames in quotes or parentheses between first and last names. For example, John “Jack” Jones or John (Jack) Jones are not acceptable, but John Jones, Jack Jones or John Jack Jones are acceptable.

**Candidate's Residence** - If a candidate's municipality of residence is different from the municipality used for mailing purposes, both must be given. Indicate if the municipality of residence is a town, village, or city.

**Date of Election** - Insert the date of the election. If the nomination paper is being circulated for a spring election, the date is the first Tuesday in April. If the election is a special nonpartisan election, the date of the special election must be listed.

**Title of Office** - The name of the office must be listed along with any branch, district, or seat number that clearly identifies the office the candidate is seeking. If necessary, the name of the jurisdiction that identifies the office, such as Dane County Circuit Court Judge, Branch 3, must also be listed.

**Name of Jurisdiction** - The nomination papers must also indicate the municipality or jurisdiction in which the signing electors are qualified to vote, as it relates to the office sought by the candidate named on the nomination paper. For example, for a statewide office the jurisdiction is the State of Wisconsin. Others may be the county, town, village, city, aldermanic district, school district, or town sanitary district, as required.

**Signatures of Electors** - Only qualified electors of the jurisdiction or the district the candidate seeks to represent may sign the nomination papers. Each elector's municipality of residence must be listed on the nomination paper along with the mailing address, including any street, fire or rural route number, box number (if rural route) and street or road name. The Street & Number or Rural Route section for each elector's address is split into two lines. The first line is for the street address. The second line is for the municipality for mailing purposes. The Municipality of Residence listed for each signing elector must clearly identify the town, village or city where the elector's voting residence is located. A post office box number alone does not show where the elector actually resides. The date the elector signed the nomination paper, including month, day and year, must be indicated. Ditto marks that follow correct and complete address or date information are acceptable. The circulator may add any missing or illegible address or date information before the papers are filed with the filing officer.

**Signature of Circulator** - The circulator should carefully read the language of the *Certification of Circulator*. THE CIRCULATOR MUST PERSONALLY PRESENT THE NOMINATION PAPER TO EACH SIGNER. THE NOMINATION PAPER MAY NOT BE LEFT UNATTENDED ON COUNTERS OR POSTED ON BULLETIN BOARDS. The circulator's complete address (including municipality of residence) must be listed in the certification. After obtaining signatures of electors, the circulator must sign and date the certification.

**Other Instructions** - Candidates and circulators should review GAB 2.05, 2.07, Wis. Adm. Code.

- Nomination papers must be in the physical custody of the appropriate filing officer by the filing deadline. A postmark on the filing deadline is NOT sufficient. Nomination papers CANNOT be faxed to the filing officer.
- Nomination papers with the required number of signatures must be filed with the appropriate filing officer no later than 5:00 p.m. on the first Tuesday in January (or the next day if the first Tuesday is a holiday) before the spring election. Special elections may have different filing deadlines. Check with the filing officer.
- In order for a candidate's name to be placed on the ballot, a candidate must file a *Campaign Registration Statement* (GAB-1), a *Declaration of Candidacy* (GAB-162), and *Nomination Papers* (GAB-169) containing the appropriate number of signatures for the office sought no later than the filing deadline. §8.10(3), Wis. Stats. Candidates for state office and municipal judge must also file a statement of economic interests with the Government Accountability Board by the third business day after the nomination paper filing deadline. §19.43, Wis. Stats. If any one of these required forms is not filed by the deadline, the candidate's name will not be placed on the ballot. §8.30, Wis. Stats.
- If a candidate or circulator has any questions, he or she should contact the filing officer.

## NOMINATION PAPER FOR PARTISAN OFFICE

Candidate's name; no titles may be used.		Street, fire, or rural route number; box number (if rural route); and name of street or road		Name of municipality for voting purposes <input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
Name of municipality for mailing purposes	State <b>WI</b>	zip code	Type of election <input type="checkbox"/> general <input type="checkbox"/> special	Election date	Name of Party or Statement of Principle (5 words or less)
Title of office		District or Jurisdiction <input type="checkbox"/> District number _____ <input type="checkbox"/> Jurisdiction (county) _____		Name of jurisdiction or district in which candidate seeks office	

I, the undersigned, request that the candidate, whose name and address are listed above, be placed on the ballot at the election described above as a candidate representing the party or statement of principle indicated above, so that voters will have the opportunity to vote for  him or  her for the office listed above. I am eligible to vote in the jurisdiction or district in which the candidate named above seeks office. I have not signed the nomination paper of any other candidate for the same office at this election.

THE MUNICIPALITY USED FOR MAILING PURPOSES, WHEN DIFFERENT THAN MUNICIPALITY OF RESIDENCE, IS NOT SUFFICIENT. THE NAME OF THE MUNICIPALITY OF RESIDENCE MUST ALWAYS BE LISTED.			
SIGNATURES OF ELECTORS	STREET & NUMBER OR RURAL ROUTE Rural address must also include box or fire no.	MUNICIPALITY OF RESIDENCE Indicate Town, Village, or City	DATE OF SIGNING
1.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
2.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
3.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
4.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
5.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
6.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
7.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
8.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
9.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	
10.		<input type="checkbox"/> Town <input type="checkbox"/> Village <input type="checkbox"/> City	

### CERTIFICATION OF CIRCULATOR

I, \_\_\_\_\_, certify:  
(Name of circulator)

I reside at \_\_\_\_\_  
(Circulator's residence - Include number, street, and municipality.)

I personally circulated this nomination paper and personally obtained each of the signatures on this paper. I know that the signers are electors of the jurisdiction or district the candidate seeks to represent. I know that each person signed the paper with full knowledge of its content on the date indicated opposite his or her name. I know their respective residences given. I intend to support this candidate. I am aware that falsifying this certification is punishable under §12.13(3)(a), Wis. Stats.

(Date)

(Signature of circulator)

EB-168 (Rev. 06/2008) The information on this form is required by §§. 8.15, 8.20, 8.50, Wis. Stats.

This form is prescribed by:  
Government Accountability Board  
17 West Main Street, Suite 310  
P.O. Box 2973  
Madison, WI 53701-2973 608 266-8005  
<http://gab.wi.gov> Email: [gab@wi.gov](mailto:gab@wi.gov)

Page No.

## INSTRUCTIONS FOR PREPARING NOMINATION PAPERS FOR PARTISAN OFFICE

This is a sample nomination paper form. It conforms to the statutory requirements for nomination papers for partisan office. All information concerning the candidate must be completed in full before circulating this form to obtain signatures of electors. All information concerning the signing electors and the circulator must be completed in full before filing with the appropriate filing officer. This form may be reproduced in any way. A candidate's picture and biographical data may also be added to this form. The Government Accountability Board has determined that no disclaimer or other attribution statement is required on nomination papers.

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No titles are permitted. In addition, names such as “Red” or “Skip” are permitted, but names which have an apparent electoral purpose or benefit, such as “Lower taxes,” “None of the above” or “Lower Spending” are not permitted. It is also not permissible to add nicknames in quotes or parentheses between first and last names. For example, John “Jack” Jones or John (Jack) Jones are not acceptable, but John Jones, Jack Jones or John Jack Jones are acceptable.

**Candidate's Residence** - If a candidate's municipality of residence is different from the municipality used for mailing purposes, both must be given. Indicate if the municipality of residence is a town, village, or city.

**Date of Election** - Insert the date of the election. If the nomination paper is being circulated for a general election, the date is the Tuesday after the first Monday in November of an even-numbered year. If the election is a special partisan election, the date of the special election must be listed.

**Party or Statement of Principle** – Insert the name of the party the candidate represents. Independent candidates may provide a Statement of Principle, not to exceed 5 words.

**Title of Office** - The name of the office must be listed along with the jurisdiction or district number that clearly identifies the office the candidate is seeking, for example, Representative to the Assembly – 1<sup>st</sup> district or Dane County District Attorney.

**Name of Jurisdiction** - The nomination papers must also indicate the municipality or jurisdiction in which the signing electors are qualified to vote, as it relates to the office sought by the candidate named on the nomination paper. For example, for a statewide office the jurisdiction is the State of Wisconsin. Other examples are 1<sup>st</sup> Congressional District, 24<sup>th</sup> Assembly District or Brown County.

**Signatures of Electors** - Only qualified electors of the jurisdiction or the district the candidate seeks to represent may sign the nomination papers. Each elector's municipality of residence must be listed on the nomination paper along with the mailing address, including any street, fire or rural route number, box number (if rural route) and street or road name. The Street & Number or Rural Route section for each elector's address is split into two lines. The first line is for the street address. The second line is for the municipality for mailing purposes. The Municipality of Residence listed for each signing elector must clearly identify the town, village or city where the elector's voting residence is located. A post office box number alone does not show where the elector actually resides. The date the elector signed the nomination paper, including month, day and year, must be indicated. Ditto marks that follow correct and complete address or date information are acceptable. The circulator may add any missing or illegible address or date information before the papers are filed with the filing officer.

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- Nomination papers must be in the physical custody of the appropriate filing officer by the filing deadline. A postmark on the filing deadline is NOT sufficient. Nomination papers CANNOT be faxed to the filing officer.
- Nomination papers with the required number of signatures must be filed with the appropriate filing officer no later than 5:00 p.m. on the second Tuesday in July (or the next day if the second Tuesday is a holiday) before the general election. Special elections may have different filing deadlines. Check with the filing officer.
- In order for a candidate's name to be placed on the ballot, a candidate must file a *Campaign Registration Statement* (EB-1), a *Declaration of Candidacy* (EB-162), and *Nomination Papers* (EB-168) containing the appropriate number of signatures for the office sought no later than the filing deadline. §8.15(6), Wis. Stats. Candidates for state office and municipal judge must also file a statement of economic interests with the Government Accountability Board by the third business day after the nomination paper filing deadline. §19.43, Wis. Stats. If any one of these required forms is not filed by the deadline, the candidate's name will not be placed on the ballot. §8.30, Wis. Stats.
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