

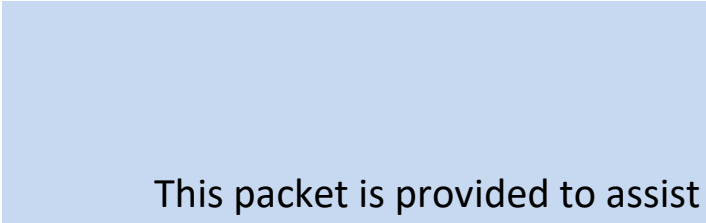


City of Phoenix

SPECIAL VACANCY ELECTION

DISTRICT 7

CANDIDATE INFORMATION PACKET



This packet is provided to assist candidates in meeting legal requirements of candidacy; however, **it is the candidate's responsibility to ensure that all legal requirements have been met.** City staff cannot provide legal advice.

Upon request, this publication is available through appropriate auxiliary aids or services to accommodate an individual with a disability by calling 602-262-6837; emailing a request to phoenixelections@phoenix.gov, faxing a request to 602-495-5847; or using the 7-1-1 Relay System.

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City of Phoenix
DENISE ARCHIBALD
CITY CLERK

March 27, 2024

**NOTICE TO CANDIDATES FOR SPECIAL VACANCY ELECTION
DISTRICT 7 VACANCY**

This notice is to inform prospective candidates of the Special Vacancy Election process and the City of Phoenix Charter provisions applicable to filling Council Member vacancies.

Phoenix City Charter

Chapter III, Section 5 of the City of Phoenix City Charter contains the requirements for filling vacancies in the City of Phoenix elective offices. The requirements related to the Special Election are as follows:

If a vacancy occurs 365 days or more prior to the end of the term, there shall be a special election held to fill the unexpired portion of the term subject to the following provisions:

- a) **There shall be a period of 10 days from the date the vacancy occurs during which any person desiring to run for the vacant office must declare as a candidate for the office.**
- b) The council shall within 10 days of the expiration of the period provided in subparagraph (a) of this paragraph or if any vacancies occur during this period, within 10 days of the expiration of the period provided in subparagraph (a) for the last vacancy, call a special election to fill the vacancy or vacancies to be held not less than 120 days from the date it is called.
- c) Candidates for vacant positions shall be entitled to circulate nomination petitions for the office as soon as the vacancy occurs.
- d) The procedure for nomination and election shall be the same as for the regular mayor and council election to the extent possible.

Candidate Declaration (Required)

Qualified residents who live in District 7 and would like to run in the Special Vacancy Election **MUST declare as a candidate within 10 calendar days from the date of the vacancy, by 5:00 p.m. April 8, 2024.** To declare their candidacy, **candidates MUST complete and submit a 'Declaration of Candidacy for Special Vacancy Election – District 7' form** to the City Clerk's Office, by 5:00 p.m. April 8, 2024. A person may not run in the Special Vacancy Election if they fail to file the declaration form with the City Clerk's Office by the deadline.

Declaration of Candidacy Forms can be submitted to the City Clerk's Office starting once the vacancy takes effect after 3pm on March 28th and by 5:00 p.m. on April 8, 2024:

- By email to: phoenixelections@phoenix.gov OR
- In person at: City Hall, 200 W. Washington St., 15th Floor, Phoenix, AZ, 85003
Please note, City Hall is by appointment only. Call 602-262-6837 to make an appointment.

► **Declaration of Candidacy Form is available in the Special Vacancy Election Candidate Packet.**

Statement of Interest Form & Collection of Nomination Petition Signatures

A 'Statement of Interest' form must be filed with the City Clerk **PRIOR** to collecting any petition signatures. Any signatures collected before filing the Statement of Interest Form with the City Clerk will not be valid and are subject to challenge. [A.R.S §§ 16-311(H); 16-341(I)]

► ***Statement of Interest Form is available in the Special Vacancy Election Candidate Packet.***

Nomination Petitions for the Special Vacancy Election may be circulated as soon as the vacancy occurs (after a Statement of Interest form is filed with the City Clerk's Office) and are due, along with all required nomination papers, to the City Clerk's Office by 5:00 p. m. July 8, 2024.

► ***A sample Nomination Petition Form is available in the Special Vacancy Election Candidate Packet.***


Special Vacancy Election Candidate Packet

Additional information for candidates running in the Special Vacancy Election is provided in the 'Special Vacancy Election Candidate Packet' published online at phoenix.gov/elections under the '[Council Vacancy Timeframe & Process](#)' section.

Prospective candidates should contact the City Clerk's Office to schedule a Special Vacancy Candidate Packet Review Meeting by calling 602-262-6837.

Information is provided by the City of Phoenix for the purpose of providing assistance in meeting legal requirements; however, **it is the applicant's responsibility to ensure that all legal requirements have been met.**

Sincerely,


Denise Archibald
City Clerk

SPECIAL VACANCY ELECTION

CANDIDATE INFORMATION – BECOMING A CANDIDATE

QUALIFICATIONS FOR CANDIDACY

Qualified Elector: Each candidate must be a qualified elector of the City of Phoenix.

Residency: At the time of filing nomination papers and during the person’s tenure, the candidate must maintain permanent residence within the district from which the candidate is nominated. [City Charter Ch. III, Sec. 1 (C) & (E)]

Declaration: Qualified residents who live in District 7 and would like to run in the Special Vacancy Election must declare as a candidate within 10 calendar days from the date of the vacancy, by 5:00 p.m. April 8, 2024. A person may not run in the Special Vacancy Election if they fail to file the declaration form with the City Clerk’s Office by the deadline.

STEP 1 – REVIEW THIS CANDIDATE PACKET THOROUGHLY

Request a meeting with City Clerk election staff to review this packet in detail (recommended). Go to the “[City Contact Information](#)” section of this packet for contact information.

STEP 2 – FILE A DECLARATION OF CANDIDACY FORM WITH THE CITY CLERK’S OFFICE BY 5:00 P.M. APRIL 8, 2024

Qualified residents who live in District 7 and would like to run in the Special Vacancy Election **MUST** declare as a candidate within 10 calendar days from the date of the vacancy, by 5:00 p.m. April 8, 2024. To declare their candidacy, candidates **MUST** complete and submit a ‘Declaration of Candidacy for Special Vacancy Election – District 7’ form to the City Clerk’s Office, by 5:00 p.m. April 8, 2024. A person may not run in the Special Vacancy Election if they fail to file the declaration form with the City Clerk’s Office by the deadline.

► **Form in Appendix A.**

STEP 3 – FILE A CANDIDATE STATEMENT OF INTEREST FORM WITH THE CITY CLERK BEFORE COLLECTING ANY SIGNATURES

The Statement of Interest Form must be filed with the City Clerk **PRIOR** to collecting any petition signatures. Any signatures collected before filing the Statement of Interest Form with the City Clerk will not be valid and are subject to challenge. [A.R.S §§ 16-311(H); 16-341(I)] ► **Form in Appendix A1.**

SPECIAL VACANCY ELECTION

CANDIDATE INFORMATION – BECOMING A CANDIDATE (cont.)

STEP 4 – SIGNATURE COLLECTION - NOMINATION PETITIONS

- Candidates that want their names to appear on the ballot must file nomination petitions containing a sufficient number of valid signatures of registered Phoenix voters to be certified by the City Clerk.
- Time frame: Nomination petitions (using hard-copy nomination petition sheets) can be circulated and signature collection can begin, as soon as the vacancy occurs (after 3PM on March 28, 2024) and only after first submitting the Statement of Interest Form with the City Clerk.
- Required Number of Signatures: Candidates must obtain the following number of valid signatures from qualified electors for the following office [City Charter Ch. XII, Sec. 2]:
 - o Council Member: 200 valid signatures of registered voters from the respective Council District
- Nomination Petitions: Signatures must be collected using a Petition Sheet that meets all of the requirements outlined in Phoenix City Code Sec. 12-1100.
 - ▶ **Requirements & Sample Petition Forms in Appendix A8**
- Filing: Nomination Petitions must be filed with the City Clerk no less than 120 days prior to the election (by 5 p.m. July 8, 2024). [A.R.S. §16-341 (C) – this time frame applies to the November 5, 2024 election to meet deadlines for the County ballot]

Note: The candidate's name on all nomination papers, including the Statement of Interest and Petition Sheets must be consistent and the exact way the candidate desires to have their name printed on the official ballot. The candidate's name is limited to the candidate's given name, surname, and nickname or abbreviated name requirements outlined in Phoenix City Code Sec. 12-1102 and A.R.S. § 16-311(G).

- Circulators – must ensure:
 - o The persons signing are registered voters and reside in the respective Council District.
 - o Each line is filled in completely and is legible – signature, printed name, residence and full date.
 - o There are no more than fifteen signers on each petition sheet.
 - o The signer has not signed another petition for a candidate for the same office.
 - o Their Circulator ID # (if any) is listed on each petition sheet. Circulators who are not residents of the State of AZ must register and obtain a number with the Arizona Secretary of State's Office.
- ▶ **AZ Secretary of State Petition Circulation Training Guide in Appendix A19 & online at www.azsos.gov/.**
[City Charter Ch. XII; City Code Sec. 12-1100, 12-1101; A.R.S. §§ 16-101; 16-321(D); 16-341]

SPECIAL VACANCY ELECTION

CANDIDATE INFORMATION – BECOMING A CANDIDATE (cont.)

STEP 5 – FILE NOMINATION PAPERS & PETITIONS WITH SIGNATURES WITH CITY CLERK

- Candidates must submit the forms listed below (nomination papers) plus nomination petitions with signatures to the City Clerk by the **filing deadline: 5:00 p.m. July 8, 2024.**
- All required forms and nomination petitions with signatures must be filed together, at one time.
- A person who does not file timely will not be eligible to have their name printed on the ballot.
- All forms and petitions are a public record.
- Contact the City Clerk’s Office to schedule an appointment to file. The filing process takes approximately 30-45 minutes and includes: verifying candidate’s voter registration status, ensuring all required forms are submitted, determining the number of nomination petition sheets with signatures received, and issuing a receipt for the number of sheets received.

NOMINATION PAPERS: Blank copies of the forms listed below are included in this packet in the Appendix List.

- Acceptance of Nomination Form:** This form is for the candidate to certify they are a qualified elector, resident of the City of Phoenix, and have no unsatisfied monetary penalties, fines or judgments. On this form, candidates also note the exact manner in which they desire to have their name printed on the ballot. [City Charter Ch. XII, Sec. 3; City Code Sec. 12-1102; A.R.S. § 16-311] ► **Form in Appendix A2.**
- Electioneering Notice:** This notice is filed by candidates acknowledging they understand that electioneering is prohibited within 75 feet of the entrance to any polling location. *Additional details on pg. 14.* [City Code Sec. 12-511; A.R.S. §16-515] ► **Form in Appendix A3.**
- Financial Disclosure Statement Form:** This statement pertains to the candidate’s personal finances and covers the 12-month period prior to the date of filing. Once filed, it is a public record and is posted online. *Additional details on pg. 16.* [City Code Sec. 12-1401; A.R.S. § 38-543] ► **Form in Appendix A4.**
- Statement of Organization (if applicable):** A candidate must register as a candidate committee by submitting a Statement of Organization form to the City Clerk **if/when the candidate receives contributions or makes expenditures, in any combination of at least \$500 in connection with that candidacy.** Registration is required **within 10 days of meeting the \$500 threshold.** *Additional details on pgs. 17 & 18.* [City Code Sec. 12-1102; A.R.S. Title 16 Ch. 6] ► **Sample Form in Appendix A5.**
- Notice of Candidacy (optional):** This notice is posted online to provide candidate contact information to the public and is used for voter outreach/education and a point of contact for the City Clerk’s Office. ► **Form in Appendix A6.**
- Voluntary Contributions/Expenditure Limitations Affidavit (optional):** This form is optional. If filed, it must be notarized. Candidates that file this affidavit are setting limits on personal contributions, loans, and expenditure limitations. Personal use of campaign funds is prohibited. [City Code Sec. 12-1500; 12-1502 & 15-503] ► **Form in Appendix A7.**
- Political Signs – Responsible Person Information Form (optional during nomination filing):** This form is to file notification of the person who will be responsible for the proper erection, on-going maintenance, and timely removal of signs. ► **Form in Appendix A13b.**

NOMINATION PETITIONS (WITH SIGNATURES)

Submit all nomination petition sheets with signatures to the City Clerk. Prior to the filing appointment, have all petition sheets organized in alpha-order by the circulator’s last name.

► **Requirements & Sample Petition Forms in Appendix A8**

SPECIAL VACANCY ELECTION

CANDIDATE INFORMATION – BECOMING A CANDIDATE (cont.)

STEP 6 – SIGNATURE VERIFICATION/CHALLENGE PERIOD/CERTIFICATION

Signature Verification: Signatures on petition sheets will be verified against voter registration records to determine the validity of the signatures.

Certification:

- The City Clerk may reject a candidate filing for any of the following reasons:
 - o Failure to file sufficient number of nomination petition signatures.
 - o Failure to file nomination papers/forms or nomination petitions.
 - o Failure to fully or properly complete any required papers/forms.
 - o Failure to file nomination papers/forms and petitions with signatures by the deadline.
 - o Failure to use the correct form or version of a form or document.
 - o Seeking more than one office at the same time, if the candidate would be prohibited from serving in the offices simultaneously.
 - o If the candidate is liable for \$1,000 or more in campaign finance related fines, penalties, late fees or judgments that have not be resolved.

[City Charter Ch. XII, Sec. 2; City Code Sec. 12-1100, 12-1101, 12-1102; A.R.S. §§ 16-311; 16-341]

- No later than 10 days after the deadline to file (by July 18, 2024), the City Clerk shall create the list of candidates who filed nomination papers and petitions that were sufficient and met the requirements to have their names placed on the ballot.
- The City Clerk will notify each candidate of the results of their filing.

Challenge Period: An elector may file a court action challenging the nomination of a candidate no later than 5 p.m. on the 10th day, excluding Saturday, Sunday and legal holidays, after the last day for the filing of nomination papers/petitions (by July 22, 2024). In the event a challenge is filed, it will be the person who submitted the petition, and not the City, that will be required to defend the legal sufficiency of the petition. A candidate also may be challenged on grounds relating to qualifications of office. [A.R.S. § 16-351]

CITY CONTACT INFORMATION

This packet and additional information are available online at phoenix.gov/elections.

CITY CLERK DEPARTMENT

For any questions related to this packet, please contact the City Clerk Department – Elections Section:

Blaine Comeaux
602-495-5896

blaine.comeaux@phoenix.gov

Sarai Marroquin
602-256-3240

sarai.marroquin@phoenix.gov

Lupe Lerma
602-262-7665

lupe.lerma@phoenix.gov

To contact the City Clerk:

- Denise Archibald, City Clerk
- Email: denise.archibald@phoenix.gov
- Phone: 602-262-6558

PRIMARY POINT OF CONTACT FOR CITY INFORMATION – CITY MANAGER’S OFFICE

The City Manager has appointed a primary point of contact for candidates to request general City information, as needed:

- Ginger Spencer, Deputy City Manager
- Email: ginger.spencer@phoenix.gov
- Phone: 602-534-8261

THE PHOENIX BIRD – USE OF CORPORATE SYMBOL – COMMUNICATIONS OFFICE

The City of Phoenix bird symbol cannot be used on any campaign materials and related communication platforms. Such use may create the false impression that a candidate is being endorsed by the City or otherwise affiliated with the organization. For additional information or questions regarding the use of the Phoenix bird please contact:

- Dan Wilson, Communications Director
- Email: Daniel.B.Wilson@phoenix.gov
- Phone: 602-495-5901

POLITICAL SIGNS – PLANNING & DEVELOPMENT DEPARTMENT

Information about signs is listed in this packet in the ‘Political Signs’ section.

All individuals or organizations erecting political signs are required to file notification of the person who will be responsible for the proper erection, on-going maintenance, and timely removal of signs. To file notification, complete and file the ‘Political Signs – Responsible Person Information Form’ ► **Form in Appendix A13b.**

For additional information or questions related to signs, please contact the Planning and Development Department, Signs Services Section:

- Phone: (602) 495-0301
- Email: pdd.signservices@phoenix.gov

To reclaim a sign that was removed by City staff contact:

- Michael Rush, City Clerk Department
- Phone: 602-495-3622

► **More information on page 15.**

GENERAL INFORMATION

FORM OF GOVERNMENT

Phoenix has a Council-Manager form of government. In this form of government, the Mayor and Council Members (elected by Phoenix citizens) set policy and the City Manager (appointed by the Mayor and Council) implements that policy and manages the day-to-day operations of the City. [City Charter, Ch. 3, Sec. 1]

SPECIAL VACANCY ELECTION TERM

The Special Vacancy Election is for voters to choose an Interim Elected Council Member to serve out the remainder of the District 7 term starting the first business day after the Canvass of the Votes (after the Nov. 5, 2024 Election or March 11, 2025 Election, if a Runoff Election is required) and ending at 10:00 a.m., April 21, 2025.

SPECIAL VACANCY ELECTION DATE

The Special Vacancy Election will be held on November 5, 2024 (County-conducted election) and a Runoff Election (if needed) will be held March 11, 2025 (City-conducted election).

COUNTY-CONDUCTED ELECTION – NOVEMBER 5, 2024

The November 5, 2024 City of Phoenix Special Vacancy Election will be conducted by Maricopa County. Phoenix candidate races and ballot measures will appear on the County ballot along with other jurisdiction items.

CITY-CONDUCTED RUNOFF ELECTION (IF NEEDED) – MARCH 11, 2025

A runoff election is required when no single candidate receives a majority (50% +1) of the votes for the office they are running for. When this happens, the top two candidates that received the most votes will advance to a runoff election on the next available election date. If a runoff election is required after the November 5, 2024 Special Vacancy Election, the Runoff Election will be held on March 11, 2025 and will be a City-conducted election.

GENERAL INFORMATION (cont.)

VOTER REGISTRATION

- To be eligible to vote in a Phoenix election, a person must be a registered voter and reside within the City of Phoenix at least 29 days immediately prior to the election they want to vote in. [City Code Sec. 12-101]
- Voter registration is administered by Maricopa County. All changes to voter registration information must be completed by the County. City of Phoenix staff do not have the ability to make changes to voter registration information, changes must be requested through the County Recorder's Office.
- Voters may register through any of the following:
 - o Register Online at: servicearizona.com
 - o Fill out a registration form available through: Maricopa County at maricopa.vote.
 - o The Phoenix City Clerk's Office - 15th Floor of Phoenix City Hall at 200 W. Washington St.

For questions or more information, contact the Maricopa County Elections Department at 602-506-1511.

ACTIVE EARLY VOTING LIST

- All registered voters who are on the active early voting list will automatically be mailed out a ballot approximately 27 days prior to the election.
- To join the active early voting list, go to maricopa.vote and sign-up to automatically receive a ballot.
- Prior to the election, registered voters who are on the list are first mailed an election notice/postcard that can be used to request any one of the following four actions, if needed:
 - o to be removed from the active early voting list;
 - o the ballot not to be sent;
 - o the ballot be sent to an alternate mailing address; or
 - o to update the voter's name, mailing or residence address.

If no action is requested, the voter will receive a ballot by mail automatically to the address on file.

Please note: Election mail cannot be forwarded by the post office, even if a forwarding address has been provided to them. Therefore, a written request for an alternate mailing address must be received by the entity conducting the election (County for November 2024 or City for March 2025) for the ballot to be sent to a different address not associated with the voter's registration record.

IN-PERSON VOTING LOCATIONS – NOVEMBER 5, 2024

Voters wishing to vote in-person in the November 5th election must vote at County designated voting locations.

- Voting locations will be designated by the County and will be listed online at maricopa.vote.
- Identification (ID): Voters are required to provide ID at all voting locations, including early voting sites. Voters that do not present appropriate ID at a voting location, may vote a provisional ballot. ID requirements can be found online at maricopa.vote.

VOTING CENTERS - MARCH 11, 2025 RUNOFF (IF ANY)

Voting Centers are used for City-conducted elections and would be used for a March 2025 Runoff Election, if any. Any voter can use any of the voting centers established by the City to cast a ballot and are not required to vote at a specified polling place in the voter's precinct. Voting Centers are open for three days: Saturday and Monday before the election, and Tuesday, Election Day. Voting Center maps will be posted online at phoenix.gov/elections, if a Runoff Election is required.

GENERAL INFORMATION (cont.)

EARLY VOTING

	November 5, 2024 County-conducted Election	March 11, 2025 Runoff (if any) City-conducted Election
Request an Early Ballot by 5PM on 11 th Day Before Election (if needed) A.R.S § 16-542(E)	<ul style="list-style-type: none"> • By October 25, 2024 • Online: maricopa.vote • Phone: 602-506-1511 • In Writing: Maricopa County Elections 510 S. Third Ave. Phoenix, AZ 85003 	<ul style="list-style-type: none"> • By February 28, 2025 • Email: phoenixelections@phoenix.gov • Phone: 602-262-6837 • In Writing: City Clerk Department 200 W. Washington St. 15th FloorPhoenix, AZ 85003
In-Person Early Voting A.R.S § 16-542(A) (Same ID requirements as voting center locations)	<ul style="list-style-type: none"> • October 9, 2024 – November 1, 2024 • At various locations, determined by Maricopa County – including Phoenix City Hall, 15th Floor 	<ul style="list-style-type: none"> • February 12, 2025 – March 7, 2025 • Exclusively at Phoenix City Hall, 15th Floor
Returning Voted Early Ballots	<ul style="list-style-type: none"> • It is recommended that voted Early Ballots be placed in the mail a minimum of 7 days before election day. • Otherwise, they may be dropped off at any of the in-person early voting locations or at a voting center. Early ballots may only be dropped off by the voter, or a voter’s family member, household member, or authorized caregiver. [A.R.S §§ 16-1005(I)(2); 16-547(E)] 	
To Check on Returned Early Ballot Status	<ul style="list-style-type: none"> • Online: maricopa.vote • Phone: 602-506-1511 • Text ‘JOIN’ to 628-683 	<ul style="list-style-type: none"> • Online: phoenix.gov/elections • Phone: 602-262-6837

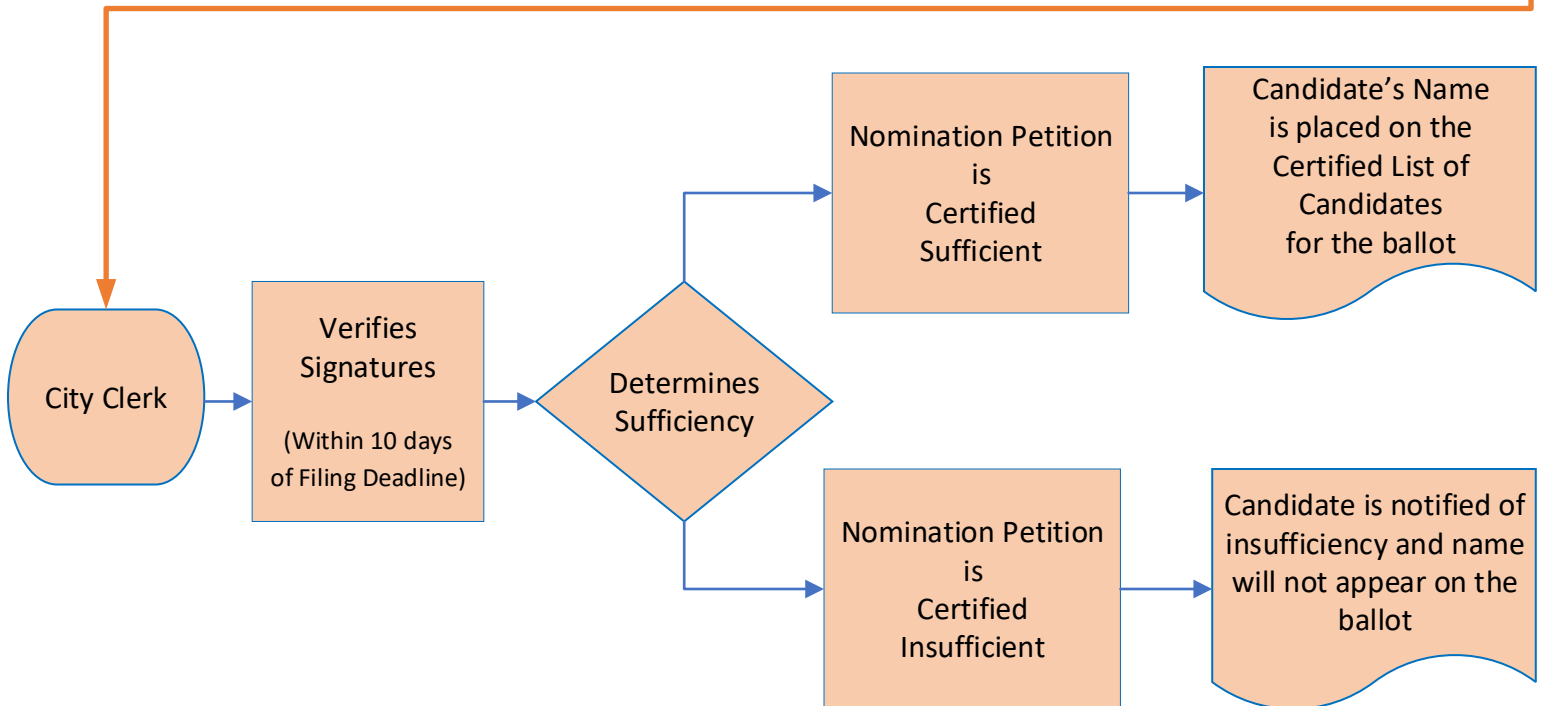
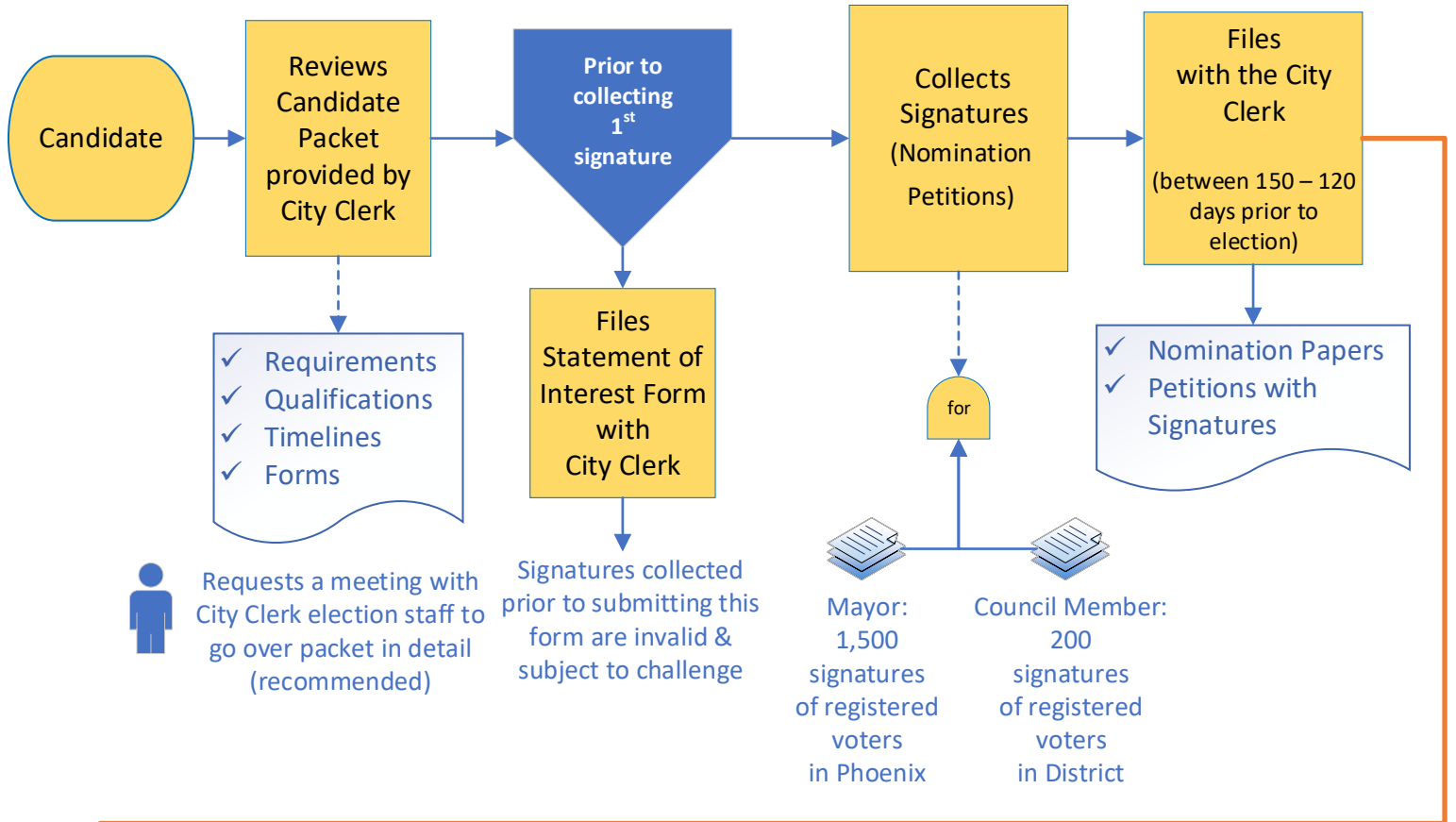
VOTING ASSISTANCE

Accessible voting devices that allow voters with disabilities to vote independently will be available at all early voting sites and voting centers. Additional voting assistance is also available upon request.

VOTER DATA REQUESTS

The City Clerk Department provides voter data information related to voter registration lists, voters on the active early voting list, and voting history, among other items, upon request. For more information, please visit phoenix.gov/elections, call 602-262-6837, or email phoenixelections@phoenix.gov.

CITY OF PHOENIX CANDIDATE NOMINATION PROCESS SUMMARY



ELECTIONEERING & POLITICAL ACTIVITY

ELECTIONEERING

- Definition: Electioneering means any *verbal* activity that can reasonably be interpreted as an attempt to persuade or influence a person to vote for or against any candidate or ballot measure. [City Code Sec. 12-1(21)]
- 75-Foot Limit – Electioneering Prohibited: Electioneering is prohibited by law within 75 feet of the entrance of a voting location while the polls are open, or while any person is voting or in line to vote; this includes all early voting locations. [City Code Sec. 12-511 & A.R.S. § 16-515]
- Outside the 75-Foot Limit: Although, electioneering is not prohibited by law outside of the 75-foot limit, some polling locations do not allow electioneering outside the 75-foot limit *on their property*. Permission may be required from the property owner for activities on their property. A property owner may ask for unauthorized persons, structures or signs to be removed from the property.
- Traffic & Walkways Must be Kept Clear: Parking areas and sidewalk or traffic ways used by voters at voting locations (whether on foot or in vehicles), as well as areas which may be used by voters requiring assistance for drive-up voting, must be kept clear and may not be encroached upon with signs, vehicles, tables, chairs, or persons.

POLITICAL ACTIVITY

- It shall be unlawful for any candidate for nomination or election to any office of the City to receive, either directly or indirectly, from any City employee, any money, or other thing of value, for the purpose of defraying the expenses of or furthering such candidate's nomination for or election to any City office. For example: Mailing lists used for campaign fund solicitations should be checked and purged of any email addresses that contain phoenix.gov. [City Code Sec. 12-217]
- Campaign Images: No City of Phoenix employee names or pictures of uniformed employees or any other identifiable depictions of employees, should be in campaign literature. No City buildings or resources may be used including City Hall, City Hall pillar, uniformed employees, or any other identifiable depictions of employees. [A.R.S. § 9-500.14 (A)]

It is the candidate's responsibility to communicate these rules to all campaign staff to ensure they do not violate any of these provisions.

POLITICAL SIGNS

REQUIREMENTS SUMMARY

- **Notification:** All individuals or organizations erecting political signs are required to file notification with the Phoenix Planning and Development Department that includes the name, address, email address and telephone number of a person(s) who will be responsible for the proper erection, on-going maintenance, and timely removal of the political sign. ► **Form in Appendix A13b.**
- **In the Right-of-Way:** Political signs may not be placed in City right-of-way, except during the 71-day period prior to the election [A.R.S. § 16-1019]. Therefore, the earliest political campaign signs may be posted in the right-of-way for the November 5, 2024 Election, is August 26, 2024.
- **On Private Property:** The City of Phoenix Zoning Ordinance Sec. 705.B (Sign Permits) and Phoenix City Code Ch. 3 (Advertising) regulate the erection and display of political signs on private property. There are no time or date restrictions regarding when political signs may be erected prior to an election on private property. However, the property owner's permission must be obtained before placing a sign on private property.
- **On City-owned Property:** As a general rule, political signs may not be posted on City-owned property. In the event a sign is reported to have been posted on City-owned property, the Planning and Development Department will contact the campaign office associated with the sign and request its removal within 48 hours. If the sign is not removed as requested, the sign will be removed, and the campaign office will be contacted to retrieve it. For reference, an interactive map of City-owned properties may be found online by selecting 'City Owned Properties' at phoenix.gov/imap.

To provide notification or obtain additional information about signs from the Planning and Development Department, please call: (602) 495-0301 or email: pdd.signservices@phoenix.gov.

► **Political Signs Summary in Appendix A13 and online at:** www.phoenix.gov/pdd/development/permits/signs

STAKING SIGNS INTO THE GROUND - ARIZONA 811 (ARIZONA BLUE STAKE)

Installation of a sign can be considered an excavation under state law and therefore requires underground utilities to be marked in advance. [A.R.S. §§ 40-360.21 (8); 40-360.22]

Arizona 811 must be contacted at least two full working days in advance of staking a sign into the ground so that underground utilities can be located and marked. If you need to have utilities located, please call 811 from anywhere in Arizona or go to Arizona811.com to create a ticket online.

General Contact Information:

Phone: 602-659-7500

Email: Customer.Support@Arizona811.com

Web: Arizona811.com

► **Arizona 811 brochure in Appendix A14 and online at:** www.arizona811.com/politicalsigns.

FINANCIAL DISCLOSURE STATEMENT

FINANCIAL DISCLOSURE REQUIREMENTS

The requirement to file a Financial Disclosure Statement is outlined in Phoenix City Code Sec. 12-1401.

At the time of filing nomination papers, a candidate for local elective office must file a verified Financial Disclosure Statement with the City Clerk. The Financial Disclosure Statement shall cover the preceding 12-month period ending on the last day of the last full month preceding the filing of nomination papers. A candidate's Financial Disclosure Statement shall contain the same information that a Local Public Officer is required to disclose.

In the form, when an amount or value is required to be reported, the amount or value may be categorized as follows:

- Category 1: \$1,000 to \$25,000
- Category 2: \$25,001 to \$100,000
- Category 3: More than \$100,000

Once filed with the City Clerk; the Financial Disclosure Statement is a public record. All Financial Disclosure Statements are posted online at phoenix.gov/elections.

This form **MUST** be submitted with the candidate's nomination papers and petitions. ► **Form in Appendix A4.**

The filing of a Financial Disclosure Statement does not relieve a candidate of the obligation to file other statements and reports that may be required by law.

The Secretary of State Financial Disclosure Guide provides guidance on how to complete a Financial Disclosure Statement. ► **AZ SOS Financial Disclosure Statement Guide in Appendix A17.**

CAMPAIGN FINANCE

REQUIREMENT TO REGISTER AS A CANDIDATE COMMITTEE

A candidate must register as a candidate committee by submitting a Statement of Organization form to the City Clerk **if/when the candidate receives contributions or makes expenditures, in any combination of at least \$500 in connection with that candidacy**. Registration is required **within 10 days of meeting the \$500 threshold**. Registration must be initiated using the City of Phoenix Campaign Finance eFiling System. Candidate Committees must enter the required information on the Statement of Organization Form in the eFiling System and then print the Statement, sign it, and file it with the City Clerk. Once a committee is registered, they will be given a City of Phoenix ID number and the committee must comply with Campaign Finance reporting requirements. [City Code Sec. 12-1102; A.R.S. Title 16 Ch. 6] ► **Sample Form in Appendix A5.**

ELECTION CYCLE

Special election, "election cycle" means the period between the date of issuance of a proclamation or order calling the special election and the last day of the calendar quarter in which the special election is held. [A.R.S. § 16-901(18)]

CANDIDATE COMMITTEE REPORTING REQUIREMENTS & SCHEDULE

Candidate committees are required to file quarterly campaign finance reports during the 4 calendar quarters covering the 12-month period preceding the 2nd (Runoff) election for the office for which the candidate is seeking election. The reporting period for a candidate committee's first campaign finance report of the election cycle shall include the entire election cycle to date. [A.R.S. § 16-927 (B)]

Please note - It is the responsibility of the person filing the report to ensure the report is accurate. City staff cannot provide legal advice regarding the contents of a campaign finance report, including advice regarding the schedule that should be used. ► **Campaign Finance Reporting Schedule in Appendix A15.**

CAMPAIGN FINANCE E-FILING SYSTEM FOR ONLINE FILING OF REPORTS

All campaign finance reports must be filed with the City Clerk using the City of Phoenix Campaign Finance eFiling System found online at: apps-secure.phoenix.gov/CampaignFinance/. ► **Campaign Finance eFiling User Manual in Appendix A16 and online at www.phoenix.gov/cityclerk/services/campaign-finance.**

FAILURE TO FILE

Penalties prescribed in A.R.S. §16-937 will apply if there is a failure to file a required campaign finance report. A committee that fails to timely file a report shall pay the filing officer a penalty of \$10 dollars for each day that the filing is late during the first fifteen days after the filing deadline and \$25 dollars for each subsequent day that the filing is late. Penalties accrue until the late report is filed.

CLOSING A COMMITTEE

To close a committee, the committee must have all required reports filed with zero balance, no outstanding campaign finance related fees or penalties, and file a signed Termination Statement with the City Clerk. Campaign Finance Reports are required to be submitted by the committee until the committee is closed.

Additional information about Campaign Finance can be found online at phoenix.gov/elections.

CAMPAIGN FINANCE (cont.)

CAMPAIGN CONTRIBUTION LIMITS

2023 - 2025 ELECTION CYCLE

Individual contribution to a candidate committee A.R.S. §16-912(A)(1)	\$6,650*
Political Action Committee contribution to a candidate committee A.R.S. §16-914(A)(1)	\$6,650*
Partnership contribution to a candidate committee A.R.S. §16-917(A)(1)	\$6,650*
Committees certified by the Secretary of State to give at an increased limit A.R.S. §16-914(B)	\$13,300**

*This limit will increase to \$6,750 on January 1, 2025 pursuant to A.R.S. § 16-931(A)(2)

**This limit will increase to \$13,500 on January 1, 2025 pursuant to A.R.S. § 16-914(B)

DIFFERENCE BETWEEN CAMPAIGN FINANCE REPORTS & FINANCIAL DISCLOSURE STATEMENTS

A Financial Disclosure Statement is a report of a candidate's personal finances and is filed at the same time as nomination papers and petitions.

Campaign Finance Reports track all the money that a committee has collected and spent during a certain period of time. Campaign Finance Reports are filed on a quarterly basis and during specific times before and after an election and cover specific periods of time. All committees who file a Statement of Organization are responsible for filing Campaign Finance Reports. Campaign Finance Reports are required until the committee files a signed Termination Statement to close the committee.

LEGAL REFERENCES

- Phoenix City Code, Charter, and Zoning Ordinance: www.codepublishing.com/AZ/Phoenix/
- Arizona Revised Statutes (ARS): www.azleg.gov/ (under Legislative Council heading)
- Secretary of State Election Manual: www.azsos.gov/elections/arizona-election-laws-publications

APPENDIX LIST

CANDIDATE FORMS

- A DECLARATION OF CANDIDACY SPECIAL VACANCY ELECTION - DISTRICT 7 FORM
 - A1 CANDIDATE STATEMENT OF INTEREST FORM
 - A2. CANDIDATE ACCEPTANCE OF NOMINATION FORM
 - A3. CANDIDATE ELECTIONEERING NOTICE
 - A4. CANDIDATE FINANCIAL DISCLOSURE STATEMENT FORM
 - A5. SAMPLE CANDIDATE COMMITTEE STATEMENT OF ORGANIZATION
 - A6. CANDIDATE NOTICE OF CANDIDACY
 - A7. CANDIDATE VOLUNTARY CONTRIBUTIONS/EXPENDITURE LIMITATIONS AFFIDAVIT
 - A8. NOMINATION PETITION CITY CODE REQUIREMENTS & SAMPLE NOMINATION PETITION SHEETS
- Sheets must be printed on 8.5x14 size paper & meet the requirements of City Code Sec. 12-1100**

OTHER INFORMATION/GUIDES

- A13. POLITICAL SIGNS SUMMARY INFORMATION
- A13b. POLITICAL SIGNS – RESPONSIBLE PERSON INFORMATION FORM
- A14. ARIZONA 811 SIGN STAKING BROCHURE
- A15. CAMPAIGN FINANCE REPORTING SCHEDULE
- A16. CAMPAIGN FINANCE E-FILING USER MANUAL
- A17. AZ SECRETARY OF STATE FINANCIAL DISCLOSURE STATEMENT GUIDE
- A18. AZ SECRETARY OF STATE PETITION CIRCULATION TRAINING GUIDE

MAPS

- A19. MAP
 - District 7 (Sized for printing on 11x17 paper if needed)

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City of Phoenix
CITY CLERK DEPARTMENT

**CANDIDATE STATEMENT OF INTEREST FORM FOR COUNCIL MEMBER
FOR COUNCIL DISTRICT 7 SPECIAL VACANCY ELECTION**

NOVEMBER 5, 2024 SPECIAL VACANCY ELECTION FOR COUNCIL DISTRICT 7

A.R.S. § 16-311 (H); A.R.S. § 16-341 (I)

You are hereby notified that I, the undersigned, hereby declare my interest to run as a candidate for the office of Council Member for District Number 7 of the City of Phoenix, Arizona at the November 2024 Special Vacancy Election to be held on November 5, 2024, and if necessary, in any Runoff Election to be held on March 11, 2025.

Political Party: _____
(if applicable, noting the City of Phoenix conducts Non-partisan Elections).

By submitting this document, I understand that any nomination petition signatures collected before the date of this Statement of Interest are invalid and may be subject to challenge pursuant to A.R.S § 16-351. I understand that filing the Candidate Statement of Interest is not the official filing of nomination papers as required by § § 16-311(B); 16-341(C).

Candidate's Printed Name

Date

Candidate's Signature

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City of Phoenix
CITY CLERK DEPARTMENT

CANDIDATE ACCEPTANCE OF NOMINATION FORM

CANDIDATE FOR:

Council Member for District Number 7

In accordance with the provisions of Phoenix City Charter Chapter III, Sec. 1 and Chapter XII, Sec. 3, you are hereby notified that I, _____, am a qualified elector and resident of the City of Phoenix, Arizona, and a resident of the district from which I seek nomination, as applicable. I declare that I am a candidate and accept nomination for the office indicated above and that I am or will be qualified to hold the office I seek at the time of election, having satisfied all legal, age, residency, citizenship and all other eligibility requirements. I also declare that I have no unsatisfied monetary penalties, fines, or judgments as prescribed by A.R.S. §16-311.

My actual residence address is:

Street City State Zip Code

My post office (mailing) address is:

Post Office Number City State Zip Code

My name is to appear on the Official Ballot as follows, consistent with City Code 12-1102:

Print First Name (legibly) Print Last Name (legibly)

Signature of Candidate _____ Date: _____

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City of Phoenix
CITY CLERK DEPARTMENT

CANDIDATE ELECTIONEERING NOTICE

Electioneering means any verbal activity that can reasonably be interpreted as an attempt to persuade or influence a person to vote for or against any candidate or ballot measure.
[City Code 12-1(21)]

Electioneering is prohibited by law within 75 feet of the entrance of a voting location while the polls are open, or while any person is voting or in line to vote; this includes all early voting locations.
[City Code 12-511 & A.R.S. § 16-515]

City Code 12-511:

- (a) There shall be no electioneering within 75 feet of the entrance of a voting center while the polls are open, or while any person entitled to vote is voting or is in line to vote.
- (b) A notice shall be posted in conjunction with each 75-foot limit sign to read as follows: "No Electioneering within 75 feet of this voting center."
- (c) There shall be no electioneering within 75 feet of any area where the City Clerk makes early or accessible voting available, or at any mail ballot receiving or voter assistance location.
- (d) This section does not authorize any person or organization to post any political sign on City property or on private property without consent of the owner. This section also does not authorize any person or organization to post any political sign in the public right-of-way outside of the posting period allowed by State Law.

It is the candidate's responsibility to communicate these rules to all campaign staff to ensure they do not violate any of these provisions.

Acknowledged By:

Candidate's Printed Name

Date

Candidate's Signature

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City of Phoenix
CITY CLERK DEPARTMENT

FINANCIAL DISCLOSURE STATEMENT

For use by Public Officers and Candidates of the City of Phoenix

Name of Public Officer or Candidate: _____

Address (Home or Work Address): _____
(Street address, City, State, Zip code) (Address may be subject to public disclosure.)

Public Office Held or Sought: _____ District # _____
(if applicable)

Please check one:

- I am a **public officer** filing this Financial Disclosure Statement covering the 12 months of calendar year 2023.
- I have been **appointed** to fill a vacancy in a City of Phoenix public office within the last 60 days and am filing this Financial Disclosure Statement covering the 12-month period ending with the last full month prior to the date I took office.
- I am a **candidate** for a City of Phoenix public office and am filing this Financial Disclosure Statement covering the 12 months preceding the date of this Statement, from the month of _____ 20____, through the month of _____ 20_____.

VERIFICATION

By signing, I verify under penalty of perjury that the information in this Financial Disclosure Statement is true and correct, and fully shows all information I am required to report pursuant to Phoenix City Code Section 12-1401.

Signature of Public Officer or Candidate

Date

When filling out this form: If additional space is needed to report information on this Statement, please indicate the attachment in the applicable box and attach additional information as numbered exhibit(s). Do not leave any section blank. If a section is not applicable write in "N/A". **Please note:** This Statement is public information and not subject to redaction.

SECTION A: PERSONAL FINANCIAL INTERESTS

This section requires disclosure of your financial interests and/or the financial interests of the member(s) of your household.

1. Identification of Household Members and Business Interests

What to disclose: List whether your spouse (if any) is a member of your household and the number of minor children (if any) who are members of your household. If none, mark "N/A". You are not required to disclose the names of your spouse or minor children, therefore, for the remaining questions in this Financial Disclosure Statement, you may identify them by using the terms "spouse", "minor child", "minor child 2", etc. in lieu of the names, as applicable.

Please note that if you choose to identify your spouse or minor children by name, the information will not be redacted when posting this Statement on the internet or providing it in response to a public records request.

If you are married, is your spouse a member of your household? Yes No N/A (not married/widowed)

Are any minor children¹ members of your household? Yes (if yes, how many_____) No N/A (none)

For the remaining questions in this Financial Disclosure Statement, the term "member of your household" or "household member" will be defined as the person(s) who correspond to your "yes" answers above.

¹ Minor children include children 18 years old and younger over whom you have joint or sole legal custody.

2. Sources of Personal Compensation

What to disclose: In subsection (2)(a), provide the name and address of any employer and/or other sources of compensation² who provided you or any member of your household more than \$1,000 (other than “gifts”) during the period covered by this Statement. Describe the nature of each and the type of services for which you or a member of your household were compensated.

You need not disclose income of a business, including money you or any member of your household received that constitutes income paid to a business that you or your household member owns or does business as. This type of business income will be disclosed in Question 12.

Subsection (2)(a):

PUBLIC OFFICER OR HOUSEHOLD MEMBER BENEFITTED	NAME AND ADDRESS OF SOURCE WHO PROVIDED COMPENSATION OVER \$1,000	NATURE OF SOURCE OR EMPLOYER'S BUSINESS	NATURE OF SERVICES PROVIDED BY PUBLIC OFFICER OR HOUSEHOLD MEMBER

What to disclose: In subsection (2)(b), if applicable, list anything of value that any other person (outside your household) received for your, or a member of your household's use or benefit during the period covered by this Statement. For example, if a person was paid by a third-party to be your personal housekeeper, identify that person, describe the nature of that person's services that benefited you, and provide information about the third-party who paid for the services on your behalf.

Subsection (2)(b) (if applicable):

PUBLIC OFFICER OR HOUSEHOLD MEMBER BENEFITTED	NAME AND ADDRESS OF PERSON WHO PROVIDED SERVICES VALUED OVER \$1,000 FOR YOUR OR YOUR HOUSEHOLD MEMBER'S USE OR BENEFIT	NATURE OF SERVICES PROVIDED BY PERSON FOR YOUR OR YOUR HOUSEHOLD MEMBER'S USE OR BENEFIT	NAME AND ADDRESS OF THIRD PARTY WHO PAID FOR PERSON'S SERVICES ON YOUR OR YOUR HOUSEHOLD MEMBER'S BEHALF

² Compensation is defined as “anything of value or advantage, present or prospective, including the forgiveness of debt.” A.R.S. § 38-541 (2).

3. Professional, Occupational, and Business Licenses

What to disclose: List all professional, occupational, or business licenses held by you or any member of your household at any time during the period covered by this Statement. This includes licenses in which you or a member of your household had an “interest,” which includes (but is not limited to) any business license held by a “controlled” or “dependent” business as defined in Question 12 below.

PUBLIC OFFICER OR HOUSEHOLD MEMBER	TYPE OF LICENSE	PERSON OR ENTITY HOLDING THE LICENSE	JURISDICTION OR ENTITY THAT ISSUED LICENSE

4. Personal Creditors

What to disclose: The name and address of each creditor to whom you or a member of your household owed a qualifying personal debt over \$1,000 during any point during the period covered by this Statement.

Additionally, if the qualifying personal debt was incurred for the first time or completely discharged (paid in full) during this period, list the date and check the applicable box to indicate whether it was incurred or discharged. Otherwise, check the box for “N/A” if the debt was not first incurred or fully discharged during the period covered by this Statement.

You need **not** disclose the following, which **do not** qualify as “personal debt”:

- Debts resulting from the ordinary conduct of a business (these will be disclosed in Section B);
- Debts on any personal residence or recreational property;
- Debts on motor vehicles used primarily for personal purposes (not commercial purposes);
- Debts secured by cash values on life insurance;
- Debts owed to relatives;
- Personal credit card transactions or the value of any retail installment contracts you or your household members entered into.

PUBLIC OFFICER OR HOUSEHOLD MEMBER OWING THE DEBT	NAME AND ADDRESS OF CREDITOR (OR PERSON TO WHOM PAYMENTS ARE MADE)	DATE INCURRED AND/OR DISCHARGED DURING THIS REPORTING PERIOD
		Date (MM/DD/YYYY): <input type="checkbox"/> Incurred <input type="checkbox"/> Discharged <input type="checkbox"/> N/A
		Date (MM/DD/YYYY): <input type="checkbox"/> Incurred <input type="checkbox"/> Discharged <input type="checkbox"/> N/A
		Date (MM/DD/YYYY): <input type="checkbox"/> Incurred <input type="checkbox"/> Discharged <input type="checkbox"/> N/A

5. Personal Debtors

What to disclose: The name of each debtor who owed you or a member of your household a debt over \$1,000 at any time during the period covered by this Statement, and the approximate value of the debt by financial category, pursuant to A.R.S. §18-444(B) and Phoenix City Code Section 12-1401(F).

Additionally, if the debt was either incurred for the first time or completely discharged (paid in full) during this period, list the date and check the applicable box to indicate whether it was incurred or discharged. Otherwise, check "N/A" if the debt was not first incurred or fully discharged during the period covered by this Statement.

PUBLIC OFFICER OR HOUSEHOLD MEMBER OWED THE DEBT	NAME OF DEBTOR	APPROXIMATE VALUE OF DEBT	DATE INCURRED AND/OR DISCHARGED DURING THIS REPORTING PERIOD
		<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +	Date (MM/DD/YYYY): <input type="checkbox"/> Incurred <input type="checkbox"/> Discharged <input type="checkbox"/> N/A
		<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +	Date (MM/DD/YYYY): <input type="checkbox"/> Incurred <input type="checkbox"/> Discharged <input type="checkbox"/> N/A
		<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +	Date (MM/DD/YYYY): <input type="checkbox"/> Incurred <input type="checkbox"/> Discharged <input type="checkbox"/> N/A

6. Gifts

What to disclose: The name of the donor who gave you or a member of your household a single gift or an accumulation of gifts during the preceding calendar year with a cumulative value over \$500, subject to the exceptions listed in the below “You need not disclose” paragraph. A “gift” means a gratuity (tip), special discount, favor, hospitality, service, economic opportunity, loan or other benefit received without adequate consideration (reciprocal value) and not provided to members of the public at large (in other words, a personal benefit you or your household member received without providing an equivalent benefit in return.)

Please note: The concept of a “gift” for purposes of this Financial Disclosure Statement is separate and distinct from the gift restrictions outlined in Arizona’s lobbying statutes. Thus, disclosure in a lobbying report does not relieve you or a member of your household’s duty to disclose gifts in this Financial Disclosure Statement.

You need not disclose the following, which do not qualify as “gifts”:

- Gifts received by will;
- Gifts received by intestate succession (in other words, gifts distributed to you or a household member according to Arizona’s intestate succession laws, not by will);
- Gifts distributed from an *inter vivos* (living) or testamentary (by will) trust established by a spouse or family member;
- Gifts received from any other member of the household;
- Gifts received by parents, grandparents, siblings, children and grandchildren; or
- Political campaign contributions reported on campaign finance reports.

PUBLIC OFFICER OR HOUSEHOLD MEMBER RECIPIENT OF GIFTS OVER \$500	NAME OF GIFT DONOR

7. Office, Position or Fiduciary Relationship in Businesses, Nonprofit Organizations or Trusts

What to disclose: The name and address of each business, organization, trust or non-profit organization or association in which you or any member of your household held any office, position, or fiduciary relationship during the period covered by this Statement, including a description of the office, position, or relationship.

PUBLIC OFFICER OR HOUSEHOLD MEMBER HAVING THE REPORTABLE RELATIONSHIP	NAME AND ADDRESS OF BUSINESS, ORGANIZATION, TRUST, OR NONPROFIT ORGANIZATION OR ASSOCIATION	DESCRIPTION OF OFFICE, POSITION OR FIDUCIARY RELATIONSHIP HELD BY THE PUBLIC OFFICER OR HOUSEHOLD MEMBER

8. Ownership or Financial Interests in Businesses, Trusts or Investment Funds

What to disclose: The name and address of each business, trust, or investment fund in which you or any member of your household had an ownership or beneficial interest of over \$1,000, during the period covered by this Statement. This includes stocks, annuities, mutual funds, or retirement funds. It also includes any financial interest in a limited liability company, partnership, joint venture, or sole proprietorship. Also, check the box to indicate the value of the interest.

PUBLIC OFFICER OR HOUSEHOLD MEMBER HAVING INTEREST	NAME AND ADDRESS OF BUSINESS, TRUST OR INVESTMENT FUND	DESCRIPTION OF THE BUSINESS, TRUST OR INVESTMENT FUND	APPROXIMATE EQUITY VALUE OF THE INTEREST (CHOOSE ONE)
			<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +
			<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +
			<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +

9. Ownership of Bonds

What to disclose: Bonds issued by the City of Phoenix, any industrial development authority of the City of Phoenix, or any nonprofit corporation organized or authorized by the City of Phoenix, worth more than \$1,000 that you or a member of your household held during the period covered by this Statement. Also, check the box to indicate the approximate value of the bonds.

Additionally, if the bonds were either acquired for the first time or completely divested (sold in full) during this period, list the date and check the box indicating whether the bonds were acquired or divested. Otherwise, check "N/A" (for "not applicable") if the bonds were not first acquired or fully divested during the period covered by this Statement.

PUBLIC OFFICER OR HOUSEHOLD MEMBER ISSUED BONDS	ISSUING GOVERNMENT AGENCY	APPROXIMATE VALUE OF BONDS (CHOOSE ONE)	DATE ACQUIRED FOR FIRST TIME AND/OR COMPLETELY DIVESTED DURING THIS REPORTING PERIOD
		<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +	Date (MM/DD/YYYY): <input type="checkbox"/> Acquired <input type="checkbox"/> Divested <input type="checkbox"/> N/A
		<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +	Date (MM/DD/YYYY): <input type="checkbox"/> Acquired <input type="checkbox"/> Divested <input type="checkbox"/> N/A
		<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +	Date (MM/DD/YYYY): <input type="checkbox"/> Acquired <input type="checkbox"/> Divested <input type="checkbox"/> N/A

10. Real Property Ownership

What to disclose: Real property (land and improvements) located in the City of Phoenix, which was owned by you or a member of your household during the period covered by this Statement, other than your primary residence or property you use for personal recreation. Describe the property's location and approximate size (acreage or square footage) and check the applicable box to indicate the approximate value of the land.

Additionally, if the land was either acquired for the first time or completely divested (sold in full) during this period, list the date and check the box to indicate whether the land was acquired or divested. Otherwise, check "N/A" (for "not applicable") if the land was not first acquired or fully divested during the period covered by this Statement.

You need not disclose: Your primary residence or property you use for personal recreation.

PUBLIC OFFICER OR HOUSEHOLD MEMBER THAT OWNS LAND	LOCATION AND APPROXIMATE SIZE OF PROPERTY LOCATED IN THE CITY OF PHOENIX	APPROXIMATE VALUE OF LAND (CHOOSE ONE)	DATE ACQUIRED FOR FIRST TIME AND/OR COMPLETELY DIVESTED DURING THIS REPORTING PERIOD
		\$1,000 - \$25,000 \$25,001 - \$100,000 \$100,001 +	Date (MM/DD/YYYY): <input type="checkbox"/> Acquired <input type="checkbox"/> Divested <input type="checkbox"/> N/A
		<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +	Date (MM/DD/YYYY): <input type="checkbox"/> Acquired <input type="checkbox"/> Divested <input type="checkbox"/> N/A
		<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +	Date (MM/DD/YYYY): <input type="checkbox"/> Acquired <input type="checkbox"/> Divested <input type="checkbox"/> N/A

11. Travel Expenses

What to disclose: Each meeting, conference, or other event during the period covered in this Statement where you participated in your official capacity and travel-related expenses of \$1,000 or more were paid on your behalf (or for which you were reimbursed) for that meeting, conference, or other event. "Travel-related expenses" include, but are not limited to, the value of transportation, meals, and lodging to attend the meeting, conference, or other event.

You need not disclose: Any meeting, conference, or other event where paid or reimbursed travel-related expenses were less than \$1,000 or your personal monies were expended related to the travel.

NAME OF MEETING, CONFERENCE, OR EVENT ATTENDED IN OFFICIAL CAPACITY AS PUBLIC OFFICER	LOCATION	AMOUNT OR VALUE OF TRAVEL COSTS (CHOOSE ONE)
		<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +
		<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +
		<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +
		<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +

SECTION B: BUSINESS FINANCIAL INTERESTS

This section requires disclosure of any financial interest of a business owned by you or a member of your household.

12. Business Names

What to disclose: The name of any business under which you or any member of your household owns or did business under (in other words, if you or your household member were self-employed) during the period covered by this Statement, including any corporations, limited liability companies, partnerships, sole proprietorships or any other type of business conducted under a trade name.

Also disclose if the named business is controlled or dependent.

- A business is classified as “controlled” if you or any member of your household (individually or combined) had an ownership interest that amounts to more than 50%.
- A business is classified as “dependent,” on the other hand, if: (1) you or any household member (individually or combined) had an ownership interest that amounts to more than 10%; and (2) the business received more than \$10,000 from a single source during the period covered by this Statement, which amounted to more than 50% of the business’ gross income for the period.

Please note: If the business was either controlled or dependent, check the box to indicate whether it was controlled or dependent in the last column below. If the business was both controlled *and* dependent during the period covered by this Statement, check *both* boxes. Otherwise, leave the boxes in the last column below blank.

PUBLIC OFFICER OR HOUSEHOLD MEMBER OWNING THE BUSINESS	NAME AND ADDRESS OF BUSINESS	CONTROLLED OR DEPENDENT BUSINESS (CHECK ALL THAT APPLY)
		<input type="checkbox"/> Controlled <input type="checkbox"/> Dependent
		<input type="checkbox"/> Controlled <input type="checkbox"/> Dependent
		<input type="checkbox"/> Controlled <input type="checkbox"/> Dependent
		<input type="checkbox"/> Controlled <input type="checkbox"/> Dependent

Please Note: If a business listed above (in Question 12) was neither “controlled” nor “dependent” during the period covered by this Statement, you do not need to complete the remainder of this Statement (Questions 13-17) with respect to that business. If *none* of the businesses listed above (in Question 12) were “controlled” or “dependent,” you need not complete the remainder of this Statement. For all sections that are not applicable, write in “N/A”.

13. Controlled Business Information (if applicable)

What to disclose: The name of each controlled business you listed in Question 12, and the goods or services provided by the business. If a single client or customer (whether a person or business) account for more than \$10,000 and 25% of your business’ gross income during the period covered by this Statement, the client or customer is deemed a “major client” and therefore you must describe what your business provided to this major client in the third column below. Also, if the major client is a business, please describe the client’s type of business activities in the final column below (but if the major client is an individual, write “N/A” for “not applicable” in the final column below). If the business does not have a major client, write “N/A” for “not applicable” in the last two columns below.

You need not disclose: The name of any major client, or the activities of any major client that is an individual. If you or your household member does not own a business, or if your or your household member’s business is not a controlled business, you may write in “N/A” for “not applicable”.

NAME OF YOUR OR YOUR HOUSEHOLD MEMBERS’ CONTROLLED BUSINESS	GOODS OR SERVICES PROVIDED BY THE CONTROLLED BUSINESS	DESCRIBE WHAT YOUR BUSINESS PROVIDES TO ITS MAJOR CLIENT	TYPE OF BUSINESS ACTIVITIES OF THE MAJOR CLIENT (IF A BUSINESS)

14. Dependent Business Information (if applicable)

What to disclose: The name of each dependent business listed in Question 12, and the goods or services provided by the business. You must describe what your business provided to its major “source of compensation” * in the third column below. Also, if the “source of compensation” is a business, describe the type of business activities it performs in the final column below (but if the “source of compensation” is an individual, write “N/A” for “not applicable” in the final column below).

If the dependent business is also a controlled business, disclose the business only in Question 13 above and write “N/A” for “not applicable” for this question.

You need not disclose: The name of any “source of compensation,” or the activities of any “source of compensation” that is an individual. If you or your household member does not own a business, or if your or your household member’s business is not a dependent business, you may write in “N/A”.

NAME OF YOUR OR YOUR HOUSEHOLD MEMBER’S DEPENDENT BUSINESS	GOODS OR SERVICES PROVIDED BY THE DEPENDENT BUSINESS	DESCRIBE WHAT YOUR BUSINESS PROVIDES TO SOURCE OF COMPENSATION	TYPE OF BUSINESS ACTIVITIES OF THE SOURCE OF COMPENSATION (IF A BUSINESS)

*For this section, “source of compensation” is defined as a person or a business that accounts for more than \$10,000 and 50% of the dependent business’ gross income during the reporting period.

15. Real Property Owned by a Controlled or Dependent Business

What to disclose: City of Phoenix real property (land and improvements), which was owned by a controlled or dependent business during the period covered by this Statement. Also describe the property’s location and approximate size (acreage or square footage) and check the box to indicate the approximate value of the land. If the business is one that deals in real property and improvements, check the box that corresponds to the aggregate value of all parcels held by the business during the period covered by this Statement.

Additionally, if the land was either acquired for the first time or completely divested (sold in full) during this period, list the date and check the applicable box to indicate whether the land was acquired or divested. Otherwise, check “N/A” (for “not applicable”) if the land was not first acquired or fully divested during the period covered by this Statement.

You need not disclose: If you or your household member does not own a business, or if your or your household member’s business is not a dependent business, you may write in “N/A” (for “not applicable”).

NAME OF CONTROLLED OR DEPENDENT BUSINESS THAT OWNS LAND	LOCATION AND APPROXIMATE SIZE OF PROPERTY LOCATED IN THE CITY OF PHOENIX	APPROXIMATE VALUE OF LAND (CHOOSE ONE)	DATE LAND ACQUIRED FOR FIRST TIME AND/OR COMPLETELY DIVESTED DURING THIS REPORTING PERIOD
		<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +	Date (MM/DD/YYYY): <input type="checkbox"/> Acquired <input type="checkbox"/> Divested <input type="checkbox"/> N/A
		<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +	Date (MM/DD/YYYY): <input type="checkbox"/> Acquired <input type="checkbox"/> Divested <input type="checkbox"/> N/A
		<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +	Date (MM/DD/YYYY): <input type="checkbox"/> Acquired <input type="checkbox"/> Divested <input type="checkbox"/> N/A

16. Controlled or Dependent Business’ Creditors

What to disclose: The name and address of each creditor to which a controlled or dependent business owed more than \$10,000, if that amount was also more than 30% of the total business indebtedness at any time during the period covered by this Statement (“qualifying business debt”).

Additionally, if the qualifying business debt was either incurred for the first time or completely discharged (paid in full) during this period, list the date and check the box to indicate whether it was incurred or discharged. Otherwise, check “N/A” (for “not applicable”) if the business debt was not first incurred or fully discharged during the period covered by this Statement.

You need not disclose: If you or your household member does not own a business, or if your or your household member’s business is not a controlled or dependent business, you may write in “N/A”.

NAME OF CONTROLLED OR DEPENDENT BUSINESS OWING THE QUALIFYING DEBT	NAME AND ADDRESS OF CREDITOR (OR PERSON TO WHOM PAYMENTS ARE MADE)	DATE INCURRED FOR FIRST TIME AND/OR COMPLETELY DISCHARGED DURING THIS REPORTING PERIOD
		Date (MM/DD/YYYY): <input type="checkbox"/> Incurred <input type="checkbox"/> Discharged <input type="checkbox"/> N/A
		Date (MM/DD/YYYY): <input type="checkbox"/> Incurred <input type="checkbox"/> Discharged <input type="checkbox"/> N/A
		Date (MM/DD/YYYY): <input type="checkbox"/> Incurred <input type="checkbox"/> Discharged <input type="checkbox"/> N/A

17. Controlled or Dependent Business' Debtors

What to disclose: The name of each debtor who owed more than \$10,000 to a controlled or dependent business, if that amount was also more than 30% of the total indebtedness owed to the controlled or dependent business at any time during the period covered by this Statement ("qualifying business debt"). Also check the box to indicate the approximate value of the debt by financial category.

Additionally, if the qualifying business debt was either incurred for the first time or completely discharged (paid in full) during this period, list the date and check the box to indicate whether it was incurred or discharged. Otherwise, check "N/A" (for "not applicable") if the business debt was not first incurred or fully discharged during the period covered by this Statement.

You need not disclose: If you or your household member does not own a business, or if your or your household member's business is not a controlled or dependent business, you may write in "N/A".

NAME OF CONTROLLED OR DEPENDENT BUSINESS OWED THE DEBT	NAME OF DEBTOR	APPROXIMATE VALUE OF DEBT (CHOOSE ONE)	DATE INCURRED FOR FIRST TIME AND/OR COMPLETELY DISCHARGED DURING THIS REPORTING PERIOD
		<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +	Date (MM/DD/YYYY): <input type="checkbox"/> Incurred <input type="checkbox"/> Discharged <input type="checkbox"/> N/A
		<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +	Date (MM/DD/YYYY): <input type="checkbox"/> Incurred <input type="checkbox"/> Discharged <input type="checkbox"/> N/A
		<input type="checkbox"/> \$1,000 - \$25,000 <input type="checkbox"/> \$25,001 - \$100,000 <input type="checkbox"/> \$100,001 +	Date (MM/DD/YYYY): <input type="checkbox"/> Incurred <input type="checkbox"/> Discharged <input type="checkbox"/> N/A

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- Initial Application
- Amended Application
- Date: _____

COMMITTEE ID NUMBER
(office use only)



CITY OF PHOENIX COMMITTEE STATEMENT OF ORGANIZATION

COMMITTEE TYPE (choose one):

Candidate

Committee Name (required): _____
(first or last name & office)

Candidate Information:
Candidate's Name (required): _____
Candidate's mailing address (required): _____
Candidate's email address (required): _____
Candidate's phone number (required): _____
Candidate's website (if any): _____

Office Sought: City Office: _____

District: _____

Election Cycle for Office Sought (year the election will take place) (required): _____

Political Action Committee (PAC)

Committee Name (required): _____
(if sponsored, must include sponsor's name)

Political Function (optional): Contributions Candidate-Related Independent Expenditures
(select any that apply) Ballot Measure Expenditures Recall Expenditures

Sponsorship Information: Sponsor's name or nickname (required): _____
(if applicable) Sponsor's mailing address (required): _____
Sponsor's email address (required): _____
Sponsor's phone number (if any): _____
Sponsor's website (if any): _____

Special Status (if applicable) Separate Segregated Fund of a Corporation, LLC, Partnership, or Union
 Standing Committee (must also complete separate standing committee registration)
 Mega PAC (must provide proof of Mega PAC status to filing officer) (amended applications only)

Initial Application
 Amended Application
Date: _____

COMMITTEE ID NUMBER
(office use only)



City of Phoenix Revision 1/13/17

**CITY OF PHOENIX
COMMITTEE STATEMENT
OF ORGANIZATION**

COMMITTEE INFORMATION:

Contact Information: Committee's mailing address (required): _____
Committee's email address (required): _____
Committee's phone number (if any): _____
Committee's website (if any): _____

Chairperson's Information: Chairperson's name (required): _____
Chairperson's physical address (required): _____
Chairperson's mailing address (if different): _____
Chairperson's email address (required): _____
Chairperson's phone number (required): _____
Chairperson's employer (required): _____
Chairperson's occupation (required): _____

Treasurer's Information: Treasurer's name (required): _____
Treasurer's physical address (required): _____
Treasurer's mailing address (if different): _____
Treasurer's email address (required): _____
Treasurer's phone number (required): _____
Treasurer's employer (required): _____
Treasurer's occupation (required): _____

Bank or Financial Institution: Bank name (required): _____
(do not list acct numbers) Additional bank name (if applicable): _____
Additional bank name (if applicable): _____

DECLARATION AND SIGNATURES:

I declare under penalty of perjury that the foregoing information is true and correct. I further declare that I: (1) consent to serve as chairperson or treasurer of the committee named herein, if applicable; (2) designate the above-named committee as my official candidate committee and authorize it to receive/make contributions/expenditures on my behalf, if applicable; (3) have read the Secretary of State's campaign finance and reporting guide; (4) agree to comply with Arizona election law, including campaign finance laws codified at A.R.S. §§ 16-901 to 16-938; and (5) agree to accept all notifications and legal service of process for campaign finance purposes via the email address(es) provided herein.

Chairperson's signature: _____ Date: _____

Treasurer's signature: _____ Date: _____

Candidate's signature (if applicable): _____ Date: _____

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City of Phoenix
CITY CLERK DEPARTMENT

CANDIDATE NOTICE OF CANDIDACY

I hereby notify the City Clerk that I, _____
am a resident of the City of Phoenix and I submit this notice of candidacy for the following office:

CANDIDATE FOR:

Council Member for District Number 7

I understand that at the time of my nomination and through the term of my office, I must be a resident of the City of Phoenix and the district listed (if applicable).

In accordance with my candidacy, I hereby request that I receive all documents, forms, and information provided by the City of Phoenix to candidates for the office I am seeking. I understand that a copy of this completed form will be available to the public and will be posted on the internet at phoenix.gov.

Candidate's Signature

Phone

Date

Candidate's Mailing Address

Candidate's Email Address

Candidate's Web Address (if any)

c: City Manager's Office



City of Phoenix
CITY CLERK DEPARTMENT

OFFICE USE ONLY

VOLUNTARY CONTRIBUTIONS/EXPENDITURES LIMITATIONS AFFIDAVIT

CITY CODE 12-1502

CANDIDATE FOR:

Council Member for District Number 7

STATE OF ARIZONA)

County of Maricopa)

AFFIDAVIT OF _____

Candidate's Name

PERSONAL CONTRIBUTIONS, LOANS AND EXPENDITURES LIMITATION

As a candidate for an elective office of the City of Phoenix, by this affidavit, I hereby express my intent and commitment to voluntarily limit my total personal contributions, loans and expenditures in support of my candidacy for each Mayor and Council, Runoff, or Special Election in which I am a candidate for Mayor to a total of not more than \$40,000, or, if a candidate for Council Member, to a total of not more than \$5,000.

Candidate's Signature

Date

TOTAL EXPENDITURES LIMITATION

As a candidate for an elective office of the City of Phoenix, by this affidavit, I hereby express my intent and commitment to voluntarily limit the total expenditures in support of my candidacy by myself and all committees or groups under my control or authority for each Mayor and Council, Runoff or Special Election in which I am a candidate for Mayor to a total of not more than \$250,000, or, if a candidate for Council Member, to a total of not more than \$50,000.

Candidate's Signature

Date

SUBSCRIBED and sworn to (or affirmed) before me by _____

this _____ day of _____, 20 _____.

NOTARY PUBLIC

(SEAL)

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OFFICE USE ONLY

NOMINATION PETITION CITY CODE REQUIREMENTS

NOVEMBER 5, 2024 ELECTION FOR MAYOR AND COUNCIL DISTRICTS 1, 3, 5 & 7

Phoenix City Code Section 12-1100 – Form of nomination petitions.

- (a) A nomination petition shall contain the name of the office to be filled, the candidate's name, and the candidate's residence address. The petition shall be signed only by qualified electors who have not signed the nomination petition of another candidate for that office.
- (b) Nomination petitions for the office of Mayor shall be captioned "Nomination Petition For Mayor," followed by the language of the petition in substantially the following form:

NOMINATION PETITION FOR MAYOR

I, the undersigned, a qualified elector residing within the City of Phoenix, Arizona, do hereby join in a petition for the nomination of _____ who resides at _____ in the City of Phoenix, Arizona, for the office of Mayor, to be voted for at the municipal election to be held in the City of Phoenix, on the ___ day of _____, 20___, and I hereby affirm that I am qualified to vote for this office, that I have not signed and will not sign a petition nominating any other candidate for the above named office, and that my actual residence is as set opposite my name below. I further declare that if I choose to use a post office box address on this petition, my residence address has not changed since I last reported it to the County Recorder for purposes of updating my voter registration file.

- (c) Nomination petitions for the office of City Council member shall be captioned "Nomination Petition For City Council Member," followed by the language of the petition in substantially the following form:

NOMINATION PETITION FOR CITY COUNCIL MEMBER

I, the undersigned, a qualified elector residing within District _____ of the City of Phoenix, Arizona, hereby join in a petition for the nomination of _____, who resides at _____ in the City of Phoenix, Arizona, for the office of City Council Member from District _____, to be voted for at the municipal election to be held in the City of Phoenix, on the _____ day of _____, 20___, and I hereby affirm that I am qualified to vote for this office, that I have not signed and will not sign a petition nominating any other candidate for the above named office, and that my actual residence is as set opposite my name below. I further declare that if I choose to use a post office box address on this petition, my residence address has not changed since I last reported it to the County Recorder for purposes of updating my voter registration file.

- (d) Nomination petitions shall be on paper eight and one-half inches long and fourteen inches wide.
- (e) A photograph of the candidate may appear on the nomination petition.
- (f) The petition shall contain fifteen lines spaced no less than five-sixteenths of an inch apart and consecutively numbered one through fifteen.
- (g) The signature portion of the petition shall be divided into columns headed by the titles: signature; printed name; actual residence address, description of place of residence, or Arizona post office box address, city or town and zip code; and date signed.
- (h) A certificate in substantially the following form shall appear below the signature portion of a petition for Mayor:

CERTIFICATE

I, the undersigned, qualified to register to vote in the State of Arizona, do hereby certify that each of the signatures appearing on this petition sheet was signed in my presence on the date indicated and that to the best of my knowledge and belief all the signers of this nomination petition are qualified electors of the City of Phoenix, Arizona.

- (i) A certificate in substantially the following form shall appear below the signature portion of a petition for City Council Member:

CERTIFICATE

I, the undersigned, qualified to register to vote in the State of Arizona, do hereby certify that each of the signatures appearing on this petition sheet was signed in my presence on the date indicated and that to the best of my knowledge and belief all the signers of this nomination petition are qualified electors of the Council District the candidate named on this petition seeks to represent.

- (j) The nomination petition of a person seeking to fill an unexpired vacant term for any City elective office shall designate the expiration date of the term following the name of the office being sought.

NOMINATION PETITION FOR CITY COUNCIL MEMBER

I, the undersigned, a qualified elector residing within District 7 of the City of Phoenix, Arizona, hereby join in a petition for the nomination of _____, who resides at _____ in the City of Phoenix, Arizona, for the office of City Council Member from District 7, to fill the remainder of a term that expires April 21, 2025, to be voted for at the municipal election to be held in the City of Phoenix, on the 5th day of November, 2024, and I hereby affirm that I am qualified to vote for this office, that I have not signed and will not sign a petition nominating any other candidate for the above named office, and that my actual residence is as set opposite my name below. I further declare that if I choose to use a Post Office Box address on this petition, my residence address has not changed since I last reported it to the County Recorder for purposes of updating my voter registration file.

SIGNATURE	PRINTED NAME	ACTUAL RESIDENCE ADDRESS, DESCRIPTION OF PLACE OF RESIDENCE, OR ARIZONA POST OFFICE BOX ADDRESS	CITY OR TOWN & ZIP CODE	DATE SIGNED
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				
15.				

CERTIFICATE

I, the undersigned, qualified to register to vote in the State of Arizona, do hereby certify that each of the signatures appearing on this petition sheet was signed in my presence on the date indicated and that to the best of my knowledge and belief all the signers of this nomination petition are qualified electors of the Council District the candidate named on this petition seeks to represent.

Circulator's signature

Circulator's printed name

Circulator's actual residence address or description of place of residence

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PETICIÓN DE NOMBRAMIENTO PARA MIEMBRO DEL CONCEJO MUNICIPAL

Yo, el que firma abajo, soy un elector calificado que reside dentro del distrito 7 de la municipalidad de Phoenix, Arizona, y por medio de la presente me uno a la petición para el nombramiento de _____, que reside en el _____ en la Municipalidad de Phoenix, Arizona, para el puesto de Miembro del Concejo Municipal para el Distrito 7, para completar lo que queda de un periodo que expira el 21 de abril 2025, para ser elegido en la elección municipal que se llevará a cabo en la Municipalidad de Phoenix, el día 5 de noviembre de 2024, y por la presente afirmo que estoy calificado para votar para este puesto, que no he firmado y que no firmaré una petición nombrando a ningún otro candidato para el puesto mencionado arriba, y que mi domicilio es el que aparece abajo, al lado de mi nombre. Asimismo, declaro que si he decidido utilizar un buzón de correo postal en esta petición, mi dirección de residencia no ha cambiado desde la última vez que se la proporcioné al Registrador del Condado para actualizar los datos de mi registro electoral.

FIRMA	NOMBRE EN LETRA DE MOLDE	DOMICILIO ACTUAL, DESCRIPCIÓN DEL LUGAR DE RESIDENCIA, O BUZÓN DE CORREO POSTAL DE ARIZONA	CIUDAD O PUEBLO & CÓDIGO POSTAL	FECHA FIRMADO
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				
15.				

CERTIFICACIÓN

Yo, el firmante, calificado para registrarse para votar en el Estado de Arizona, declaro por medio de la presente que cada una de las firmas que aparecen en esta hoja de petición fueron firmadas en mi presencia en la fecha indicada y que, según mi leal saber y entender, todos los firmantes de esta petición de nominación son electores calificados del Distrito del Concejo que el candidato nombrado en esta petición busca representar.

Firma de la persona circulando la petición _____ Nombre impreso de la persona circulando la petición _____ Domicilio actual o descripción de lugar de residencia de la persona circulando la petición _____

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The city of Phoenix, in its ongoing efforts to provide a safe and well-maintained environment, addresses the erection and display of political signs in the Zoning Ordinance. The following information is provided as an introduction to political sign regulations and to help you avoid placing your political signs in prohibited areas.

Additional information may be obtained at Sign Services of the Planning & Development Department (PDD), Phoenix City Hall, 200 West Washington Street, (602) 495-0301 or pdd.signservices@phoenix.gov or at the following website: <https://www.phoenix.gov/pdd/development/permits/signs>

All individuals or organizations are required to file notification which includes the name, address, and telephone number of a person(s) who will be responsible for the proper erection, on-going maintenance and timely removal of the political signs.

Political signs are allowed to be placed on private property and in the public right-of-way. For regulations related to political signs on private property, please refer to the Phoenix Zoning Ordinance. For regulations related to political signs in the right-of-way along streets, please refer to Arizona Revised Statute §16-1019 (see text later in this document).

To determine where the right-of-way boundary is located, please refer to the Maricopa County Assessor's <http://maps.mcassessor.maricopa.gov/>

While political signs that are 32 square feet or less are exempt from obtaining permits for private property only, other provisions of the Sign Ordinance and Arizona State law remain applicable. Please refer to the following websites for more information:

You are responsible for reviewing, understanding and complying with the following:
<http://www.azleg.gov/ars/16/01019.htm>
A.R.S. §16-1019, Political signs; printed materials; tampering; classification

<http://www.codepublishing.com/AZ/phoenix/> (See Zoning Ordinance Chapter 7 in directory on left)

Z.O. Section 705.B.2.h., Political Signs

Z.O. Section 705.B.3.c., Signs Which Pose a Traffic Hazard

Z.O. Section 705.B.3.e., Signs Which Interfere With Visibility at Intersections or Driveways

Z.O. Section 705.C.2., Flags and Banners

Please note that Chapter 3 of the City Code has additional regulations on advertising materials such as the distribution of handbills, placards, etc.

City of Phoenix Zoning Ordinance:

All non-commercial signs, including political signs, may be erected on a lot or property with permission from the legal property owner, so long as each sign does not exceed 32 square feet. However, as stated above, you are required to file notification with PDD.

Signs cannot be erected on public utility poles, public buildings, or parks and trees and fences therein. They also must not be placed in any manner that will cause a traffic hazard or unsafe conditions for motorists and pedestrians. Signs in public rights-of-way and utility structures often pose dangerous conditions.

All political signs on private property shall be removed within ten days after the election to which they refer, as stated in Section 705.B.2.h.(3) of the Phoenix Zoning Ordinance. After the ten-day period, the Zoning Ordinance states that enforcement personnel can confiscate signs, and/or a formal citation can be issued.

For more information or for a copy of this publication in an alternate format, contact Planning & Development at 602-262-7811 voice or TTY use 7-1-1.

The entity who erects the signs is responsible for compliance with the city and state regulations, on-going maintenance, and removal of the campaign signs.

Arizona Revised Statute (ARS § 16-1019):

The city of Phoenix will not remove, alter, deface or cover any political sign in the right-of-way if the following conditions are met:

- The sign is placed in the city public right-of-way that is owned or controlled by that jurisdiction.
- The sign supports or opposes a candidate for public office or it supports or opposes a ballot measure.
- The sign is not placed in a location that is hazardous to public safety, obstructs clear vision in the area or interferes with the requirements of the Americans with Disabilities Act.
- The sign has a maximum area of sixteen square feet, if the sign is located in an area zoned for residential use, or a maximum area of thirty-two square feet if the sign is located in any other area.
- The sign contains the name and telephone number of the candidate or campaign committee contact person.

These conditions apply only during the period beginning sixty days before a primary election and ending fifteen days after the general election, except that for a sign for a candidate in a primary election who does not advance to the general election, the period ends fifteen days after the primary election.

FAQ's – Political Signs

- **Do I need a sign permit for my political sign?**

Yes, if the sign is on private property and the sign is larger than thirty-two (32) square feet.

No, if the sign is thirty-two (32) square feet or less, or it is in the right-of-way. However, you need to file the name, address, and telephone number of the person responsible for the proper erection and timely removal of the signs with PDD.

- **How do I file with PDD?**

You can file with PDD by U.S. mail, via facsimile or email.

U.S. Mail: City of Phoenix, Planning & Development Department, Signs Services, 200 West Washington, 2nd Floor, Phoenix, AZ 85003

Email: pdd.signservices@phoenix.gov

- **How early can I put up my signs before the election?**

There is no restriction on when political signs may be erected prior to the election on private property. However, political signs can be placed in the right-of-way only 71 days before a primary election.

- **Where can I place my signs?**

If the sign(s) is larger than thirty-two (32) square feet a permit can be obtained by contacting the Sign Section at 602-495-0301 or pdd.signservices@phoenix.gov.

If the sign(s) is thirty-two (32) square feet or less, then the sign can be placed on private property with the property owner's permission. Property ownership information can be obtained from the Property Records Section at (602) 262-7800.

Political signs can also be placed in the right-of-way subject to specific conditions (see Subsections C & H of ARS §16-1019 at website mentioned above).

- **What type of information is required to be placed on the sign?**

The sign must contain the name and telephone number of the candidate or campaign committee contact person.

- **Can my sign be placed anywhere on private property?**

Yes, unless the height of the sign exceeds three feet in height, in which case the sign may not be placed in the visibility triangles at the driveway or intersection. The visibility triangle is ten (10) feet by (20) feet at driveways and thirty-three (33) feet by thirty-three (33) feet at street intersections.

- **How do I determine where the property line is?**

The property line does not necessarily begin where the sidewalk or curb ends. The half-street dimension given on city quarter section maps determines property lines. Half streets are identified in the street by a brass cap, which is where a half street should be measured from. City right-of-way widths can be obtained by calling Property Records (602) 262-7800 or refer to Maricopa County Assessor's website (see above).

- **What if my sign is in violation?**

If PDD Sign Inspectors find violations, they normally contact the responsible party and allow forty-eight (48) hours to obtain compliance. In the event that it is a safety hazard, Sign Inspectors will lay the signs down and then contact the responsible party. Inspectors will take signs that cannot be laid down safely to a storage yard where the candidate may retrieve it.

If the placement of the sign in the right-of-way constitutes an emergency, sign inspectors or police officers may immediately relocate the sign. The city will notify the candidate or campaign committee that placed the sign within twenty-four hours after the relocation.

If a sign is placed in violation of the conditions above yet it is not an emergency, PDD staff may notify the candidate or campaign committee that placed the sign of the violation. If the sign remains in violation at least twenty-four hours after PDD notified the candidate or campaign committee, then staff may remove the sign. City staff shall then contact the candidate or campaign committee and shall retain the sign for at least ten business days to allow the candidate or campaign committee to retrieve the sign without penalty.

- **When do the signs need to be removed?**

Signs on private property must be removed ten (10) days after the election to which they refer. In the event of a run-off, the signs may remain for ten (10) days after the run-off election. Signs in the right-of-way must be removed fifteen (15) days after the election to which they refer except runoff elections. Please be sure to remove the stakes that the signs are placed on, as they pose a safety hazard to pedestrians and bicyclists.

- **What If I have more questions?**

Please contact PDD, Signs Services Section at pdd.signservices@phoenix.gov, (602) 495-0301 or (602) 256-4242.

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City of Phoenix

**POLITICAL SIGNS - RESPONSIBLE PERSON
INFORMATION FORM**

NOVEMBER 5, 2024 ELECTION

Pursuant to Zoning Ordinance (ZO), Section 705.B.2.h: Any person or organization planning to erect political signs relating to a candidate or ballot measure, shall first file with the Phoenix Planning & Development Department the name, address, and telephone number of the person who shall be responsible for the proper erection and timely removal of the signs.

Responsible Person's Information

First and Last Name: _____

Phone Number: _____

Address: _____
(Address, City, State, and Zip)

Email Address: _____

To file this form with the Planning and Development Department, email the completed form to: pdd.signservices@phoenix.gov

(If this form is submitted to the City Clerk Department as part of the candidate nomination process, the City Clerk Department will email the form to pdd.signservices@phoenix.gov)









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Dig this:

- Arizona law defines excavating as “any operation in which earth, rock or other material in the ground is moved, removed or otherwise displaced by means or use of any tools, equipment or explosives and includes, without limitation, grading, trenching, digging, ditching, drilling, auguring, boring, tunneling, scraping, cable or pipe plowing and driving.”
- **Utility depth is not known or guaranteed.** The depth of lines, pipes and cables can change over time. Facilities can be a few inches or several feet below the surface of the earth.
- If you strike an underground utility, stop digging. Call the facility owner/operator directly. Do not attempt to repair damages yourself!
- If you dig up an unknown line, stop working in the immediate area. Call 811 so qualified personnel can be sent to the site to determine if the line is active or abandoned.
- Utility marks are valid for 15 working days. If your project exceeds that timeframe, or if your marks disappear or are destroyed, contact Arizona 811 to have the marks refreshed. Marks must remain “visible and valid” for the duration of your project.
- Never dig outside the boundaries of your ticket or move or destroy locate marks.
- Facility owners and local municipalities mark only what they own and operate up to the point of sale, which is typically the meter. To have privately owned lines marked, you might need to hire a private locating company. Arizona 811 cannot recommend private utility locators; consult the internet or Better Business Bureau to find one.

Know the Code

Utilities are marked in colors based on their type. Locators use the Uniform Color Code for Utility Markings so utilities can always be identified by their specific color, whether they’re marked with paint, flags or whiskers:

	Proposed excavation
	Temporary survey
	Electric power
	Natural gas, oil, liquid fuels
	Communications, fiber optics, cable TV
	Water and slurry lines
	Reclaimed water
	Sanitary sewer systems

Exposing & Protecting Buried Facilities/Careful & Prudent Manner

As required by state law, and for your safety, the exact location of all buried facilities **MUST BE EXPOSED WITH HAND TOOLS IN A CAREFUL AND PRUDENT MANNER** when working within 24” of a marked facility. **Even when digging with hand tools, use caution to prevent injuries and damage to the facility.** The uncovered facility must be supported and protected prior to and during your excavation (see Arizona Revised Statutes 40-360.21 for the definition of “Careful and Prudent”). For assistance in safely exposing, supporting, and protecting a facility, contact the member underground facility owner(s)/operator(s) directly.



Digging for any reason?

You must contact Arizona 811 at least two full working days in advance so underground utilities can be located and marked. It's free. It's easy. It's the law.



**Know what's below.
Call 811 or click Arizona811.com before you dig.**

ARIZONA BLUE STAKE IS NOW ARIZONA 811



A14

About Arizona 811

Arizona 811 was established as “Arizona Blue Stake” in 1974 and changed its name to Arizona 811 in 2014. It is the center you must contact before excavating in any way, anywhere in Arizona, so underground utilities (also called “facilities”) can be marked. Knowing the location of buried facilities is the simplest and easiest way to prevent accidental utility strikes, which keeps everyone safe; protects the vital utilities we all rely on every day; and protects the environment. Arizona 811 is a private, non-profit agency. Services are free and available statewide. Learn more at Arizona811.com.



After You Contact Arizona 811

- Unless otherwise specified to you, Arizona 811 will notify the utility owners/operators in the area where you plan to dig. In response, each affected utility owner/operator (including municipal service providers) will send a utility locator to your dig site to mark the location of their underground lines, cables and pipes, or inform you they have no facilities in conflict with the dig site you identified.
- **Utility locators have two (2) full working days to respond.**
- Arizona 811 will provide you with a list of all utility owners/operators who could have facilities buried at your dig site. **Do not begin digging unless all of the utilities listed on your ticket have responded** by putting marks on the ground (such as paint or flags); calling you; emailing you; or posting an online response.
- If you have not received responses from **all** of the utility owners/operators listed on your ticket after two full working days, or if you have questions about the marks, call 811.

Arizona Law

Arizona law (A.R.S. 40-360.21-32) says underground utilities must be marked before any type of excavation by anyone, including professional excavators, homeowners and anyone else whose work disrupts the subsurface of the earth. This law is enforced by the Arizona Corporation Commission (ACC) who can issue citations for civil penalties of up to \$5,000 per violation. You could also be liable for repair and reimbursement costs and possibly face legal action (see reverse side for the legal definition of excavation). For questions regarding enforcement of this law, contact the ACC at 602-262-5601.

Simple On-Line Tools Available 24/7:

Arizona 811 has simple on-line tools available at Arizona811.com for use by various types of excavators to easily create tickets themselves:

Homeowners/Occupants

working on property they own or occupy or hiring somebody else to do the work can easily create a ticket for a single address using the **single address tool**.



Simply type in the address of your property and use simple check boxes to indicate what part of the lot on which you will be digging. If hiring a contractor to do the work, simply add their name and contact information where indicated. Ticket information including which underground facility owners will respond will be emailed.

Professional Contractors

working on somebody else's property can easily create a ticket for a single address using the **single address tool** customized for contractors. Simply type in the address of the property where you will be working



and use simple check boxes to indicate what part of the lot on which you will be digging. If hiring a sub-contractor to do the work, simply add their name and contact information where indicated. Ticket information including which underground facility owners will respond will be emailed.

Campaign Signs

Political candidates and campaigns can use the **Intersection Selection Tool** to identify the intersections at which signs will be installed using simple check boxes to select the corners. The day prior to the sign installation date indicated, a list of tickets identifying each intersection corner selected and the status of underground facility owner responses will be emailed.



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2024 CAMPAIGN FINANCE REPORTING SCHEDULE (ARS § 16-927)

REGULAR ELECTIONS FOR MAYOR & CITY COUNCIL ARE HELD IN NOVEMBER OF EVEN YEARS WITH ANY RUNOFF IN MARCH OF ODD YEARS.

A campaign finance report is a record of the contributions received and expenses made by a political action committee or candidate committee required for reporting financial activity.

Reporting Period: The time frame during which contributions were received and/or expenses were paid.

Filing Period: The time frame to submit the report. The last date of this time frame is the due date. All reports filed after this date accrue late fees.

POLITICAL ACTION COMMITTEES (PACs)

Must file Campaign Finance reports until terminated.

- ▶ If there is no City of Phoenix election in a quarter, regular quarterly reports are due.
- ▶ If there is a City of Phoenix election in a quarter, pre- and post-election reports are due in that quarter instead.
- ▶ If a due date falls on a weekend or holiday, the report is due the next business day.*

2024 Quarters	2024 Quarter Months Reporting Period	REGULAR QUARTERLY REPORT					
		Filing Period					
		DUE: No later than the third Monday in the month after the calendar quarter BETWEEN:					
1st	January 1 - March 31	April 1, 2024			April 15, 2024		
2nd	April 1 - June 30	July 1, 2024			July 15, 2024		
3rd	July 1 - September 30	October 1, 2024			October 21, 2024		
4th (Nov. 5, 2024 Regular Election)	October - December	PRE Election Report			POST Election Report		
		Reporting Period	Filing Period	Reporting Period	Filing Period		
		1st day of quarter through the 17th day before the election		DUE: No later than 10 days before the election		16th day before the election through last day of quarter	
October 1 - October 19		October 20, 2024	October 28, 2024*	October 20 - December 31	January 1, 2025	January 15, 2025	

CANDIDATE COMMITTEES (CANS)

Must file Campaign Finance reports during the 4 quarters comprising the 12 month period preceding the City's Regular 2nd (Runoff) Election. (The City's Regular Runoff Election is the 2nd Tuesday in March of odd numbered years)

- ▶ The 1st quarter report must include the entire cycle to date.

NOTE: A new Candidate Committee must report any contributions or expenditures that pre-date the committee's existence. Therefore, the coverage period of the first report should be adjusted, as needed, to the date the committee's financial activity began.

An existing Candidate Committee cannot have any reporting gaps. Therefore, the beginning date of the committee's first reporting period begins after the previous reporting period ended. There cannot be any reporting gaps from one election cycle to the next.

- ▶ If there is no City of Phoenix election in a quarter, regular quarterly reports are due.
- ▶ If there is a City of Phoenix election in a quarter, pre- and post-election reports are due in that quarter instead.
- ▶ If a due date falls on a weekend or holiday, the report is due the next business day.*

FOR ALL CANDIDATES FOR MAYOR AND DISTRICTS 1, 3, 5, & 7 RUNNING IN THE NOVEMBER 5, 2024 OR MARCH 11, 2025 ELECTIONS

4 Quarters preceding the City's Regular Runoff Election (March 9, 2021)	2024 Quarter Months Reporting Period	REGULAR QUARTERLY REPORT					
		Filing Period					
		DUE: No later than the third Monday in the month after the calendar quarter BETWEEN:					
1st	January 1 - March 31	April 1, 2024			April 15, 2024		
2nd	April 1 - June 30	July 1, 2024			July 15, 2024		
3rd	July 1 - September 30	October 1, 2024			October 21, 2024		
4th (Nov. 5, 2024 Regular Election)	October - December	PRE Election Report			POST Election Report		
		Reporting Period	Filing Period	Reporting Period	Filing Period		
		1st day of quarter through the 17th day before the election		DUE: No later than 10 days before the election		16th day before the election through last day of quarter	
October 1 - October 19		October 20, 2024	October 28, 2024*	October 20 - December 31	January 1, 2025	January 15, 2025	

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CAMPAIGN FINANCE eFILING USER MANUAL

HOW TO USE AND NAVIGATE THE eFILING SYSTEM

The Campaign Finance eFiling System is an online, web-based application designed for committees that are active in City of Phoenix elections, to electronically report and file all required campaign finance related filings. All committees registered with the City of Phoenix are required to use the City’s eFiling System for all campaign finance related filings.

The eFiling System provides real-time access to City of Phoenix campaign finance information for public viewing at <https://apps-secure.phoenix.gov/CampaignFinance/Search>. A user ID is not needed to use the public search function.

The system may be accessed online at <https://apps-secure.phoenix.gov/CampaignFinance/>.

NOTICE

Committees are responsible for ensuring that all campaign finance requirements have been met.
City staff cannot provide legal advice.

CONTACT US

<p><u>MAILING ADDRESS</u> PHOENIX CITY CLERK DEPARTMENT ATTENTION: ELECTIONS 200 W. WASHINGTON ST., 15TH FLOOR PHOENIX, AZ 85003-1611</p>	<p><u>TELEPHONE</u> (602) 262-6837 FAX: (602) 495-5847 TTY: 7-1-1 FRIENDLY</p>	<p><u>EMAIL</u> phoenixelections@phoenix.gov</p> <p><u>WEBSITE</u> www.phoenix.gov/cityclerk</p>
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HOW TO SEARCH THE DATABASE

1. GO TO 'SEARCH DATABASE' WITHIN THE CAMPAIGN FINANCE APPLICATION

<https://apps-secure.phoenix.gov/CampaignFinance/Search>

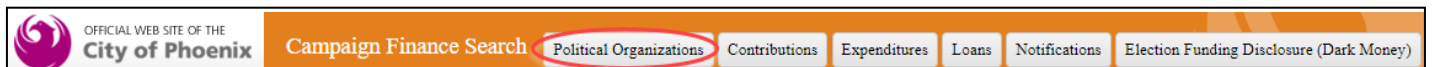
Anyone can access the eFiling System's online Public Search Database. A login is not required. It can be accessed by clicking the



"SEARCH DATABASE" link at the top left corner of the eFiling System screen or using the link provided above.

2. SEARCH FOR POLITICAL ORGANIZATIONS

Within the Search Database tab of the application, the user can navigate multiple tabs. To search for a candidate or political action committee select 'Political Organizations'



The user will be directed to a screen to search for registered Political Organizations, including their registration and termination documents.

Users may search by:

1. Committee/Org Type;
2. Political Function (for PACs only);
3. Candidate Name (for Candidate Committees only);
4. COP ID# (the Committee ID Number issued by the Phoenix City Clerk Department);
5. Committee/Org Name;
6. Chairperson's Name or;
7. Treasurer's Name.

Committee / Org Type: 1 Political Function: 2 Candidate Name: 3 COP ID#: 4
ALL ALL
Committee / Org Name: 5 Chairman Name: 6 Treasurer Name: 7
SEARCH

The search will display the committee's registration information as well as a clickable PDF to view the committee's registration/termination document. Committees highlighted in pink indicate that the committee has been terminated. Committees in blue font indicate that the committee is registered as a Standing Committee.

▶ 104 Wrong for Phoenix - No 104	< Terminated >	AN ASSOCIATION OR COMBINATION OF PERSONS THAT CIRCULATES PETITIONS IN SUPPORT OF THE QUALIFICATION OF A BALLOT MEASURE	8/23/2015 2:07:01 PM	
▶ 2022 Test CAN D2	CAN-19-31	Candidate Committee		Clickable PDF >
▶ AFSCME - PEOPLE	< Standing PAC >	Political Action Committee	7/6/2017 1:50:44 PM	

Note: Standing Political Action Committees establish their status with the Arizona Secretary of State's Office. These committees are required to file campaign finance reports only with the Office of the Secretary of State.

3. SEARCH FOR CAMPAIGN FINANCE REPORT DATA

Within the Search Database tab of the application, the user can navigate multiple tabs. To search for a Campaign Finance report data, the user can search for 1) contributions, 2) expenditures or 3) loans. Notifications that were required to be filed prior to Nov. 5, 2016, are available under 'Notifications'.



Within these tabs, users may search by Committee Name, Contributor Name, Description of the contribution, COP ID #, specific dollar ranges (Amount Low and Amount High), and specific date ranges (Date Low and Date High). There is also the option to search for No Activity Reports. The search will display the committee's reports as a clickable PDF.

Committee / Org Name:	Contributor Name:	Description:	COP ID#	No Activity	< Search Function
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	
Amount Low	Amount High	Date Low	Date High		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	SEARCH

Committee / Org Name	Contributor	Contribution Date	Amount	Reporting Period Total	Report Period	Schedule	View
Gannett Fleming, Inc. PAC	Andrew Gillespie	06/25/2021	\$ 20.00	\$ 140.00	202 Quarte		Clickable PDF >

4. SEARCH FOR ELECTION FUNDING DISCLOSURE (DARK MONEY) REPORTING

Within the Search Database tab of the application, the user can navigate multiple tabs. To search for Dark Money report data, the user selects the tab 'Elections Funding Disclosure (Dark Money)'.



The user will be navigated to the Dark Money webpage (outside of the Campaign Finance application). Scroll down to the list of Reports filed and select the link to the report under the column 'DOC ID'

<h2>Reports Filed</h2>		
DATE	NAME	DOC ID
10/22/2020	Home Builders Association of Central Arizona	240486
10/22/2020	Home Builders Association of Central Arizona	240487

CREATE AN ACCOUNT OR LOG IN IF YOU HAVE AN ACCOUNT

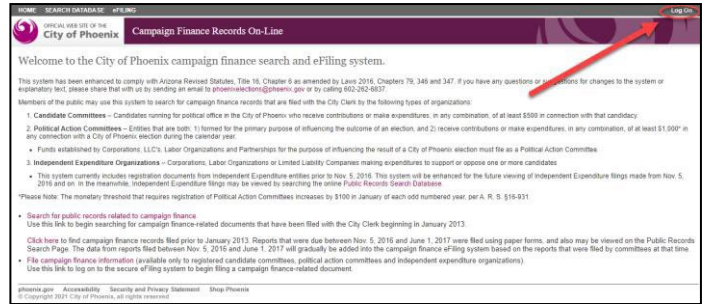
1. GO TO THE ONLINE CAMPAIGN FINANCE APPLICATION

<https://apps-secure.phoenix.gov/CampaignFinance/>

2. CREATE NEW ACCOUNT

If you have never used the City of Phoenix Campaign Finance application, click 'Log On' from the top menu bar.

If you have been involved in a previous committee, the email will still be associated in the system and can be used for multiple committees. A new login is not required.

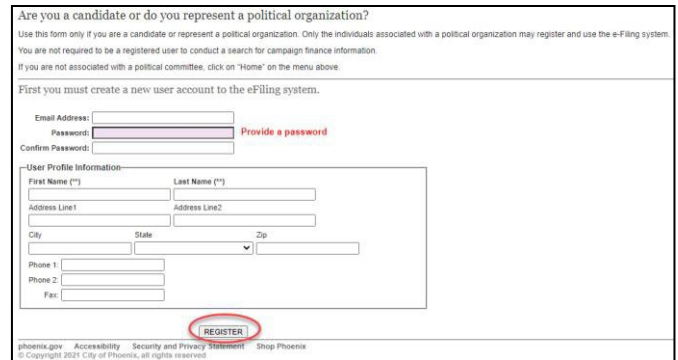
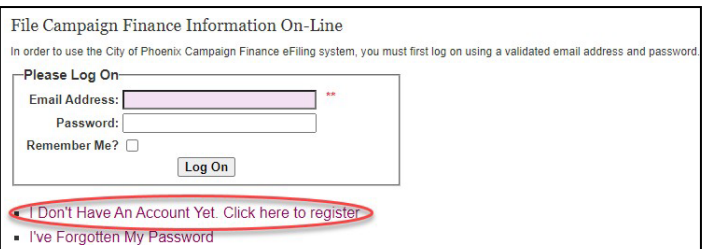


3. FILL OUT THE FORM

Select 'I Don't Have An Account Yet. Click here to register'

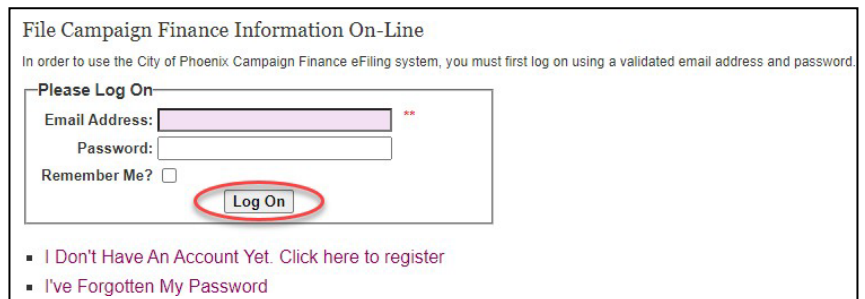
Complete the fields in the registration form and select 'REGISTER'

You should get a message saying that a confirmation email has been sent to your email. Go to your email inbox. Open the email that was sent from the City of Phoenix. Click the link inside to confirm your email. You should now be able to log in to the Campaign Finance application. If you are not seeing the e-mail after a few minutes, check your spam folder.



4. LOG ON

Enter your account email address and password and click 'Log On'.



HOW TO CREATE A COMMITTEE

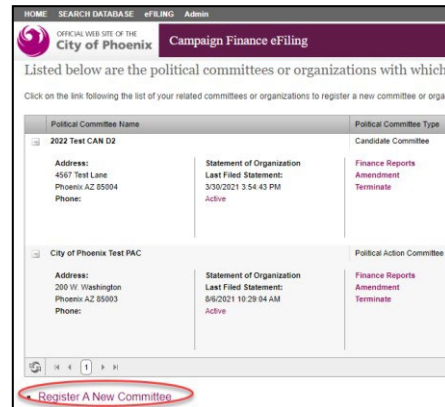
1. CLICK 'eFILING'

Click 'eFiling' in the top menu.



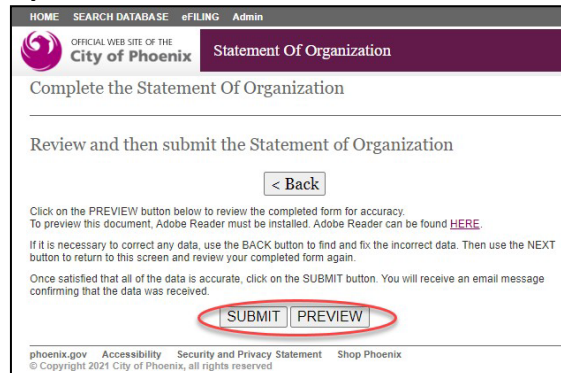
2. CLICK 'REGISTER A NEW COMMITTEE'

Click 'Register a New Committee.'



3. FILL OUT THE FORM

Select 'Statement of Organization'. Fill out your committee information and click 'Next' at the bottom to move to the next page. Per Phoenix City Code Chapter 12, Section 12-1501 (b) a unique email address must be provided for the committee, chairperson, and treasurer except in the case of a candidate committee where the candidate fills all committee roles. Continue until the page the last page and select 'PREVIEW' to review the information entered. Click 'Back' to edit the information. If a change needs to occur to a committee is currently active, **the process is to amend the Statement of Organization.**



'SUBMIT' when you are done. A pop-up window will display, after reading click 'OK'. The information entered here will be auto filled in when creating your Statement of Organization.

4. PRINT, SIGN & AND PROVIDE THE STATEMENT OF ORGANIZATION TO CITY CLERK

Select the printer button to download the committee Statement of Organization.

Sign the PDF and submit the signed document to the City Clerk's Office by mail, email or fax.



HOW TO AMEND A STATEMENT OF ORGANIZATION

1. CLICK 'eFILING'

Click 'eFiling' in the top menu.



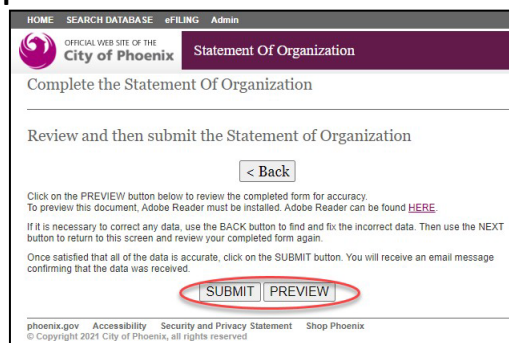
2. CLICK 'AMENDMENT'

Click 'Amendment' for the committee Statement of Organization that needs to be changed. Note: to view the Statement of Organization click 'Active'.

Political Committee Name	Political Committee Type	Status
<input type="checkbox"/> 2022 Test CAN DZ Address: 4567 Test Lane Phoenix:AZ 85004 Phone:	Candidate Committee Statement of Organization Last Filed Statement: 3/30/2021 3:54:43 PM Active Finance Reports Amendment Terminate	Current Status: Active
<input type="checkbox"/> City of Phoenix Test PAC Address: 200 W. Washington Phoenix:AZ 85003 Phone:	Political Action Committee Statement of Organization Last Filed Statement: 5/6/2021 10:29:04 AM Active Finance Reports Amendment Terminate	Current Status: Active

3. FILL OUT THE FORM

Select 'Statement of Organization'. Fill out your committee information and click 'Next' at the bottom to move to the next page. Per Phoenix City Code Chapter 12, Section 12-1501 (b) a unique email address must be provided for the committee, chairperson, and treasurer except in the case of a candidate committee where the candidate fills all committee roles. Continue until the page the last page and select 'PREVIEW' to review the information entered. Click 'Back' to edit the information. If a change needs to occur to a committee is currently active, **the process is to amend the Statement of Organization.**



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Select the printer button to download the committee Statement of Organization.

Sign the PDF and submit the signed document to the City Clerk's Office by mail, email, or fax.



HOW TO UPLOAD INFORMATION USING THE EXCEL TEMPLATE

Five campaign finance reporting schedules are available to upload data using a formatted Excel template that must be downloaded from within the eFiling application. The maximum number of entries that can be uploaded for each schedule, using the Excel template, is 4,990 entries. The schedules are:

- SCHEDULE A(1)(A) - MONETARY CONTRIBUTIONS RECEIVED FROM IN-STATE INDIVIDUALS - MORE THAN \$100 DURING ELECTION CYCLE
- SCHEDULE A(1)(C) – MONETARY CONTRIBUTIONS RECEIVED FROM OUT-OF-STATE INDIVIDUALS
- SCHEDULE A(1)(E) - MONETARY CONTRIBUTIONS FROM POLITICAL ACTION COMMITTEES
- SCHEDULE B (1) - DISBURSEMENTS FOR OPERATING EXPENSES
- SCHEDULE B(2)(A) - MONETARY CONTRIBUTIONS TO CANDIDATE COMMITTEES

1. CLICK 'eFILING'

Click 'eFiling' in the top menu.



2. CLICK 'FINANCE REPORTS'

Click 'Finance Reports' for the committee the user is entering data for.



3. NAVIGATE TO THE REPORTING SCHEDULES

Navigate to the report you would like to input data into by clicking on 'Enter Data' for the Reporting Period

Reports This Cycle:				
Report Period Name	Filing Period Start	Report Due Date	Status	
Quarter 1, 2020 - PAC - AMENDMENT	1/1/2020 12:00:00 AM	2/7/2020 11:59:00 PM	In Progress	Enter Data

Name:

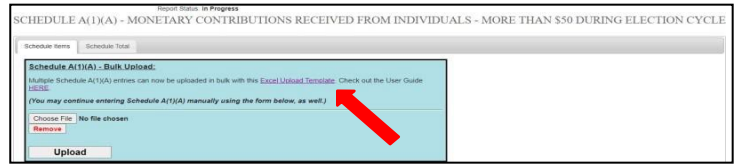
There are only five schedules available to upload data using the Excel template. All other schedules will accept entries by selecting the schedule and entering the data for each entry directly into the system, not using the template Excel.



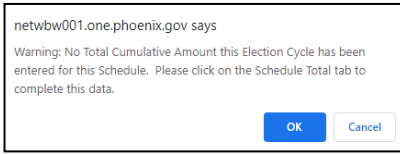
Select one of the five reporting schedules from the list on the left side.

4. DOWNLOAD THE EXCEL TEMPLATE

Click on 'Excel Upload Template' to download and save the Excel template:



Click **OK** on the pop-up warning: "No total cumulative amount this election cycle has been entered for this schedule. The cumulative amount will need to be entered manually." **NOTE:** The cumulative amount for this Election Cycle must be entered manually on each of the reporting schedules after the data is uploaded using the Excel template.



The Excel template will be downloaded. Open the file, go to FILE and SAVE AS, rename the file and save it to your PC.



The templates cannot be modified other than entering the required data. Fields in red are required fields and must contain information prior to uploading. The fields highlighted in blue are format specific, the information entered these fields must have the specific format requested. To assist with formatting, there is a 'Format Checker' in the last column to alert the user on whether the data entered is in the correct format or if there is a formatting issue that needs to be fixed prior to uploading.

Example: Schedule A(1)(a) Template

Schedule A(1)(a) Bulk Upload Template													
Complete this schedule, save it, and upload it to the Phoenix Campaign Finance database online at https://apps-secure.phoenix.gov/CampaignFinance/													
Fields in RED are REQUIRED Fields.							Fields highlighted in BLUE are format-specific. Incorrect formatting will cause the upload to be unsuccessful.						
First Name	Last Name	Address Line 1	Address Line 2	City	State	Zip Code	Occupation	Employer	Amount Received	Date Contribution	Cumulative Amount this	Cumulative Amount this	Format Checker
No Formatting Requirements	No Formatting Requirements	No Formatting Requirements	No Formatting Requirements	Format: Two-letter Uppercase Code	Format: Two-letter Uppercase Code	Format: Five-Digit Number	No Formatting Requirements	No Formatting Requirements	Format: Dollar Amount	Format: mm/dd/yyyy	Format: Dollar Amount	Format: Dollar Amount	(Please note: This tool only checks the FORMAT of your data, not the data itself.)
EXAMPLE ENTRY													
Karen	Candidate	123 E. Main St.	Apt. 123	Phoenix	AZ	85003	Manager	Business Inc.	\$500.00	1/12/2020	\$500.00	\$500.00	Looks Good!

Example of template formatting checker: Sample schedule with data entered in Excel template with correct and incorrect formatting. For the data to upload successfully all formatting issues need to be corrected prior to uploading. Example Issue: G13, incomplete zip code.

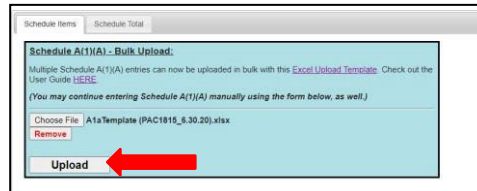
Schedule A(1)(a) Bulk Upload Template													
Complete this schedule, save it, and upload it to the Phoenix Campaign Finance database online at https://apps-secure.phoenix.gov/CampaignFinance/													
Fields in RED are REQUIRED Fields.							Fields highlighted in BLUE are format-specific. Incorrect formatting will cause the upload to be unsuccessful.						
First Name	Last Name	Address Line 1	Address Line 2	City	State	Zip Code	Occupation	Employer	Amount Received	Date Contribution	Cumulative Amount this	Cumulative Amount this	Format Checker
No Formatting Requirements	No Formatting Requirements	No Formatting Requirements	No Formatting Requirements	Format: Two-letter Uppercase Code	Format: Two-letter Uppercase Code	Format: Five-Digit Number	No Formatting Requirements	No Formatting Requirements	Format: Dollar Amount	Format: mm/dd/yyyy	Format: Dollar Amount	Format: Dollar Amount	(Please note: This tool only checks the FORMAT of your data, not the data itself.)
EXAMPLE ENTRY													
Karen	Candidate	123 E. Main St.	Apt. 23	Phoenix	AZ	85003	Manager	Business Inc.	\$500.00	1/12/2020	\$500.00	\$500.00	Looks Good!
AJDJDFD	CASEPDSDF	123 E. JONES	23	PHOENIX	AZ	85021	MANG	ASDF	\$950.00	2/18/2020	\$950.00	\$950.00	Looks Good!
KPOMADLF	UYEJMN	25634	25	PHX	AZ	85025	CYNER	ASUNMFLKA	\$523.00	1/9/2020	\$523.00	\$523.00	Looks Good!
ASDFAD	UJASEKLFM	8000 N CENTRAL		phoenix	AZ	8521	UJASDMFK	MASSDFM	\$100.00	1/2/2020	\$100.00	\$100.00	Check your formatting in cell(s) G13

5. BEGIN ENTERING DATA

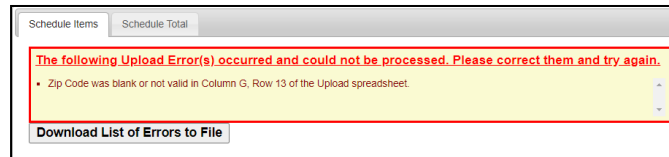
Open the saved template and begin inputting data. Once finished entering data, ensure all items on the 'FormatChecker' look good (are shaded green). Save the completed Excel file.

6. UPLOAD BULK DATA

Go back to the Campaign Finance eFiling System page for that schedule online. Click on 'Choose File', select the File Name for the Excel template you completed, then 'Click Open'. The file name selected now appears next to the 'Choose File'. Click on 'Upload'.



Formatting Issue: If there is an issue with the data upload, an Upload Error message will appear along with a list of the issues identifying the Column and Row number needed to be fixed in the Excel file you completed. Return to the Excel file you completed and correct the formatting issue(s). Re-save the file. And click on 'Upload' again.



No Formatting Issues: If the data formatting is correct, a list of all the records to be uploaded will display and you will have the option to 'Cancel' or 'Submit' the data. To view the 'Cancel' or 'Submit' options, scroll to the bottom of the table.

Are you ready to add the following data to your Financial Report?

Any changes to these records will need to be processed manually after submission.

First Name	Last Name	Address	Occupation	Employer	Amount Received	Reporting Period Total	Election Cycle Total	Received Date	Entry Date
AOIDDFD,	CASDFSDF	125P E JONES	MANG	ASDFC	850	850	850	02/08/2020	7/1/2020 3:29:58 PM
OKPOMADLFA,	UYEJNN	25594	OWNER	ASUWMFLKA	523	523	523	01/09/2020	7/1/2020 3:29:58 PM
ASDFAD	JIASDKLFM	9800 N CENTRAL	LJASDMFK	MASDFM	100	100	100	01/02/2020	7/1/2020 3:29:58 PM

[Cancel](#) [Submit](#)

Large data uploads may take several minutes.
Phoenix.gov | Accessibility | Security and Privacy Statement | Shop Phoenix
© Copyright 2020 City of Phoenix, all rights reserved.

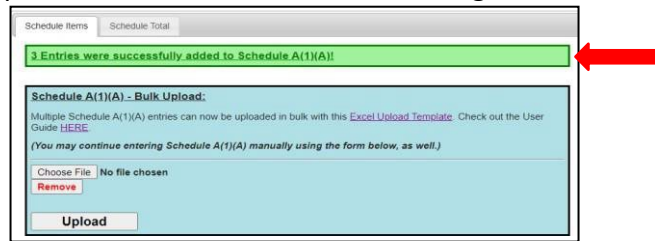
If you select 'Cancel': you will go back to the Schedule currently being worked on and the uploaded data will not be uploaded.

If you select 'Submit': the data displayed on the table will be added to the schedule selected in a bulk upload. A message will display the number of records added successfully.

NOTE: Large data uploads may take several minutes. **Please do not double click the submit button**, that will duplicate the data upload. All **duplicated** uploaded records will need to be individually and manually removed by the user within the application.

7. EDIT OR REMOVE INDIVIDUAL ENTRIES

Once a successful upload is completed, the user will see the following screen with this green header message.



The user may add manual entries, edit, or remove records for any of the unuploadable schedules within the application:

ADD NEW ENTRY									
	First Name	Last Name	Address	Amount Received	Reporting Period Total	Election Cycle Total	Received Date	Entry Date	Edit
	ASDFAD	JIASDKLFM	9800 N CENTRAL, phoenix AZ 85001	\$100.00	\$100.00	\$100.00	01/02/2020	07/01/2020	Edit
	OKPOMADLFA..	UYEJNN	25594 25, PHX AZ 85525	\$523.00	\$523.00	\$523.00	01/09/2020	07/01/2020	Edit
	AOIDDFD,	CASDFSDF	125P E JONES 23, PHOENIX AZ 85021	\$850.00	\$850.00	\$850.00	02/08/2020	07/01/2020	Edit
				Total: \$1,473.00	Total: \$1,473.00	Total: \$1,473.00			Display

Repeat for any other of the four template schedules with the bulk upload function. Remember to preview and file each report.

HOW TO FILE A CAMPAIGN FINANCE REPORT

1. CLICK 'eFILING'

Click 'eFiling' in the top menu.



2. CLICK 'FINANCE REPORTS'

Click 'Finance Reports' for the committee the user is entering data for.



3. NAVIGATE TO THE REPORTING SCHEDULES

Navigate to the report you would like to input data into by clicking on 'Enter Data' for the Reporting Period Name:

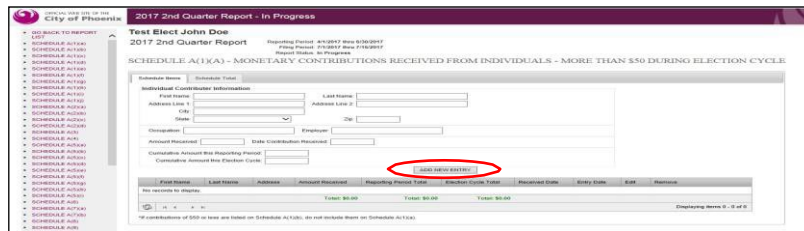
Select one of the reporting schedules from the list on the left side.

Note: all 'A' schedules are receipts, and all 'B' schedules are disbursements. For reference to full schedule names look to Appendix A.

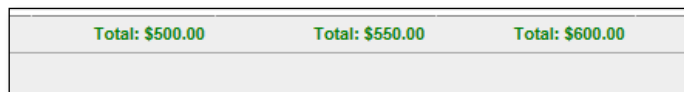


4. BEGIN ENTERING DATA

Begin entering data for the campaign finance report. Data will not be saved until the user clicks the 'ADD NEW ENTRY' button toward the bottom of the page.



At the bottom of the review menu, the total calculation for that schedule will display in green font.

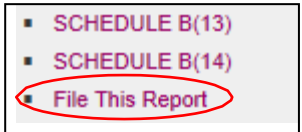


Most of the reporting schedules, there are two tabs for data entry (some may have only one tab). The first tab is the "Schedule Items" tab, where the user enters individual items or Excel uploads for a specific schedule. The second tab is the "Schedule Total" where the user will enter the Total Cumulative Amount for the Election Cycle for that schedule:

If the user leaves a schedule without entering data in this tab, a warning will pop up alerting them that this schedule is incomplete. The warning allows the user to stay on the screen to enter this data or leave the screen to go to the next reporting schedule. **Please note:** A user will not be able to file their report without entering this data.

5. COMPLETE SUMMARY TABLE

After entering data into all the applicable reporting schedules, the user must scroll to the bottom of the schedule list and click 'File This Report'. **The user is NOT officially filing the report at this point.** They are taken to a financial summary page where they can complete their report and review the data that's already been entered.



Enter beginning cash on hand (a), total receipts for the election cycle to date (b), and total disbursements election cycle to date (c). The eFiling System will automatically calculate the total receipts and disbursements for the reporting period based on the data entry from the individual schedules. The system will also calculate the remaining balance at the close of the reporting period.

FINANCIAL SUMMARY		
Activity	Cash Activity This Reporting Period	Election Cycle to Date
(a) Committee value at the beginning of this reporting period (i.e. ending balance from the previous reporting period)	<input type="text"/>	<input type="text"/>
(b) + Total receipts (from "Summary of Receipts," line 13 (cash column) for this reporting period)	6369	<input type="text"/>
(c) - Total disbursements (from "Summary of Disbursements," line 16 (cash column) for this reporting period)	481.2	<input type="text"/>
(d) = Balance at close of reporting period	5883.80	<input type="text"/>

Check here if no financial activity during the reporting period. Lines (a)-(d) still must be completed, but only this cover page need be filed.

For candidate committees that are filing for the first time in the election cycle, select the cumulative report check box in the 'FINANCIAL SUMMARY' section:

FINANCIAL SUMMARY		
Activity	Cash Activity This Reporting Period	Election Cycle to Date
(a) Committee value at the beginning of this reporting period (i.e. ending balance from the previous reporting period)	<input type="text"/>	<input type="text"/>
(b) + Total receipts (from "Summary of Receipts," line 13 (cash column) for this reporting period)	150	<input type="text"/>
(c) - Total disbursements (from "Summary of Disbursements," line 16 (cash column) for this reporting period)	250	<input type="text"/>
(d) = Balance at close of reporting period	-100.00	<input type="text"/>

Check here if no financial activity during the reporting period. Lines (a)-(d) still must be completed, but only this cover page need be filed.

Check here if this is the candidate committee's first cumulative report for the election cycle.

Most of these schedule summaries are automatically calculated based on the data that was entered in the individual reporting schedules. However, the following line items must be entered manually by the user:

Schedule A Lines: 11 & 12

Line Item	Description	Cash	Equity
11	Member Contributions (Cash)	760.00	
12	Member Contributions (Debit)	427.50	
13	Member Contributions (Credit)		760.00
14	Member Contributions (Total)	332.50	760.00
15	Member Contributions (Total)	332.50	760.00

Schedule B Lines: 4 & 13 – 15

Line Item	Description	Cash	Equity
4	Disbursements for Operating Expenses	68.25	
13	Disbursements for Operating Expenses	105.42	
14	Disbursements for Operating Expenses	138.18	
15	Disbursements for Operating Expenses	0.00	
16	Disbursements for Operating Expenses	0.00	
17	Disbursements for Operating Expenses	0.00	
18	Disbursements for Operating Expenses	0.00	
19	Disbursements for Operating Expenses	0.00	
20	Disbursements for Operating Expenses	0.00	
21	Disbursements for Operating Expenses	0.00	
22	Disbursements for Operating Expenses	0.00	
23	Disbursements for Operating Expenses	0.00	
24	Disbursements for Operating Expenses	0.00	
25	Disbursements for Operating Expenses	0.00	
26	Disbursements for Operating Expenses	0.00	
27	Disbursements for Operating Expenses	0.00	
28	Disbursements for Operating Expenses	0.00	
29	Disbursements for Operating Expenses	0.00	
30	Disbursements for Operating Expenses	0.00	
31	Disbursements for Operating Expenses	0.00	
32	Disbursements for Operating Expenses	0.00	
33	Disbursements for Operating Expenses	0.00	
34	Disbursements for Operating Expenses	0.00	
35	Disbursements for Operating Expenses	0.00	
36	Disbursements for Operating Expenses	0.00	
37	Disbursements for Operating Expenses	0.00	
38	Disbursements for Operating Expenses	0.00	
39	Disbursements for Operating Expenses	0.00	
40	Disbursements for Operating Expenses	0.00	
41	Disbursements for Operating Expenses	0.00	
42	Disbursements for Operating Expenses	0.00	
43	Disbursements for Operating Expenses	0.00	
44	Disbursements for Operating Expenses	0.00	
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177	Disbursements for Operating Expenses	0.00	
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194	Disbursements for Operating Expenses	0.00	
195	Disbursements for Operating Expenses	0.00	
196	Disbursements for Operating Expenses	0.00	
197	Disbursements for Operating Expenses	0.00	
198	Disbursements for Operating Expenses	0.00	
199	Disbursements for Operating Expenses	0.00	
200	Disbursements for Operating Expenses	0.00	

6. PREVIEW REPORT

Type in the treasurer’s name and click ‘PREVIEW REPORT’ for the user to review the data entered

To preview this document, Adobe Reader must be installed. Adobe Reader can be found [HERE](#).

PREVIEW REPORT

Under A.R.S. § 16-926(B)(5), a campaign finance report must be certified by the committee treasurer under penalty of perjury that the contents of the report are true and correct.

A signature submitted through electronic means shall have the same legal validity and enforceability as a manually executed signature or use of a paper-based recordkeeping system to the fullest extent permitted by applicable law and the committee hereby waives any objection to the contrary.

By filing this report, you certify that, under penalty of perjury, you have examined the contents of this report, and the contents are true and correct.

Type Name of Treasurer: Date: 9/2/2021

7. FILE REPORT

When ready to file, type in the treasurer’s name and click ‘I Agree/File Report’

To preview this document, Adobe Reader must be installed. Adobe Reader can be found [HERE](#).

PREVIEW REPORT

Under A.R.S. § 16-926(B)(5), a campaign finance report must be certified by the committee treasurer under penalty of perjury that the contents of the report are true and correct.

A signature submitted through electronic means shall have the same legal validity and enforceability as a manually executed signature or use of a paper-based recordkeeping system to the fullest extent permitted by applicable law and the committee hereby waives any objection to the contrary.

By filing this report, you certify that, under penalty of perjury, you have examined the contents of this report, and the contents are true and correct.

Type Name of Treasurer: Date: 9/2/2021

HOW TO FILE A NO ACTIVITY REPORT

1. CLICK 'eFILING'

Click 'eFiling' in the top menu.



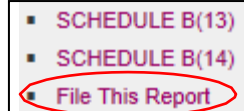
2. CLICK 'FINANCE REPORTS'

Click 'Finance Reports' for the committee the user is entering data for.



3. NAVIGATE TO FILE THIS REPORT

Scroll to the bottom of the schedule list and click 'File This Report'.



4. CHECK THE BOX TO INDICATE NO FINANCIAL ACTIVITY

Campaign Finance Report Summary and Filing		
COMMITTEE INFORMATION		
Committee Id: PAC-21-12 Committee Name: City of Phoenix Test PAC		
REPORTING PERIOD		
REPORTING PERIOD 2021 1st Quarter, Post-Election Report (PAC): February 21, 2021 to March 31, 2021		REPORT DUE April 1, 2021 to April 15, 2021
FINANCIAL SUMMARY		
Activity	Cash Activity This Reporting Period	Election Cycle to Date
(a) Committee value at the beginning of this reporting period (i.e. ending balance from the previous reporting period)		
(b) + Total receipts (from "Summary of Receipts," line 13 (cash column) for this reporting period)	0.00	
(c) - Total disbursements (from "Summary of Disbursements," line 16 (cash column) for this reporting period)	0.00	
(d) <u>Balance at close of reporting period</u>	0.00	
<input checked="" type="checkbox"/> Check here if <u>no</u> financial activity during the reporting period. Lines (a)-(d) still must be completed, but only this cover page need be filed.		

5. FILE THE REPORT

When ready to file, type in the treasurer's name and click 'I Agree/File Report'

To preview this document, Adobe Reader must be installed. Adobe Reader can be found [HERE](#).

Under A.R.S. § 16-926(B)(5), a campaign finance report must be certified by the committee treasurer under penalty of perjury that the contents of the report are true and correct.

A signature submitted through electronic means shall have the same legal validity and enforceability as a manually executed signature or use of a paper-based recordkeeping system to the fullest extent permitted by applicable law and the committee hereby waives any objection to the contrary.

By filing this report, you certify that, under penalty of perjury, you have examined the contents of this report, and the contents are true and correct.

Type Name of Treasurer: Date: 9/2/2021

HOW TO AMEND A REPORT

1. CLICK 'eFILING'

Click 'eFiling' in the top menu.



2. CLICK 'FINANCE REPORTS'

Click 'Finance Reports' for the committee the user is entering data for.



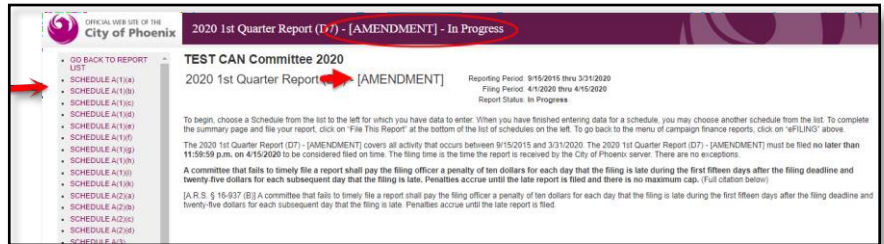
3. NAVIGATE TO THE LIST OF REPORTS FILED IN THE ELECTION CYCLE SELECTED

Select the report you would like to amend by clicking on the link under the last column to 'Amend Report'.

Report Period Name	Filing Period Start	Report Due Date	Status	Adobe PDF	View Data
2020 2nd Quarter Report	7/1/2020 12:00:00 AM	7/15/2020 11:59:59 PM	Filed	Adobe PDF	View Data Amend Report
2020 3rd Quarter Report	10/1/2020 12:00:00 AM	10/15/2020 11:59:59 PM	In Progress		Enter Data
2020 4th Quarter, Pre-Election Report	10/18/2020 12:00:00 AM	10/26/2020 11:59:59 PM	Filed	Adobe PDF	View Data Amend & File a Finance Report

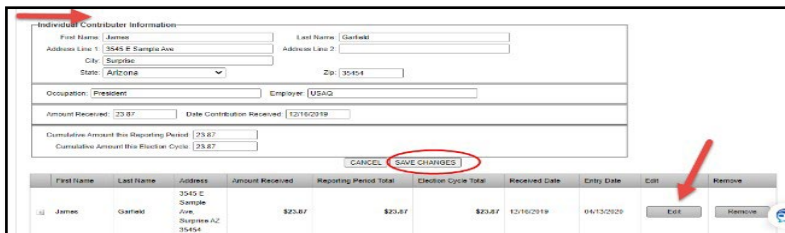
4. NAVIGATE TO THE REPORTING SCHEDULES TO AMEND

Once you select to amend a report, a list of all schedules will display with the report name selected as "[AMENDMENT] In progress".

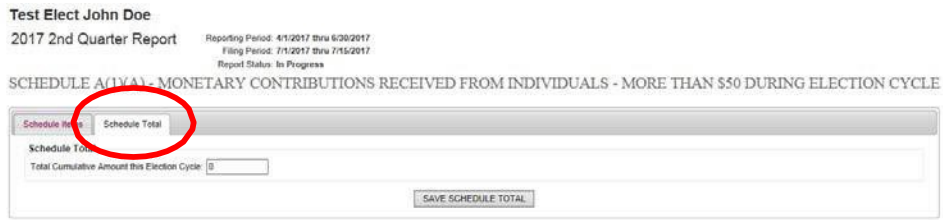


5. AMEND EXISTING DATA ON THE REPORT

To edit existing data from grid table, choose the line and click on the Edit button to view existing data and make edits. Click on the 'save changes' button once completed to update data.



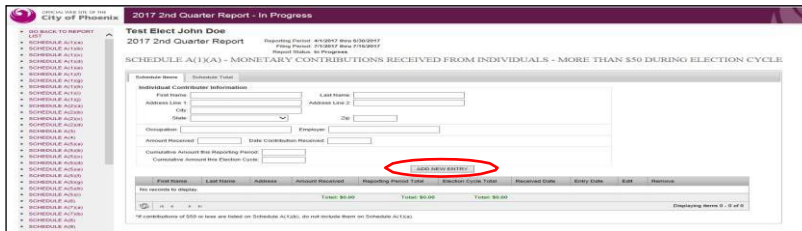
Update the second tab “Schedule Total” where the user will enter the Total Cumulative Amount for the Election Cycle for that schedule:



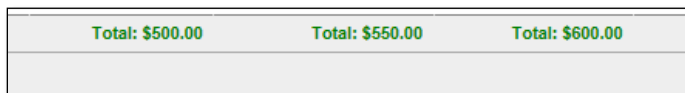
If the user leaves a schedule without entering data in this tab, a warning will pop up alerting them that this schedule is incomplete. The warning allows the user to stay on the screen to enter this data or leave the screen to go to the next reporting schedule. **Please note:** A user will not be able to file their report without entering this data.

6. ENTER ADDITIONAL DATA

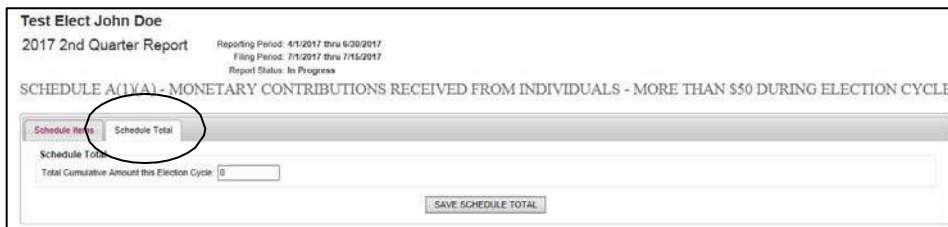
Begin entering data for the campaign finance report. Data will not be saved until the user clicks the ‘ADD NEW ENTRY’ button toward the bottom of the page.



At the bottom of the review menu, the total calculation for that schedule will display in green font.



Most of the reporting schedules, there are two tabs for data entry (some may have only one tab). The first tab is the “Schedule Items” tab, where the user enters individual items or Excel uploads for a specific schedule. The second tab is the “Schedule Total” where the user will enter the Total Cumulative Amount for the Election Cycle for that schedule:



If the user leaves a schedule without entering data in this tab, a warning will pop up alerting them that this schedule is incomplete. The warning allows the user to stay on the screen to enter this data or leave the screen to go to the next reporting schedule. **Please note:** A user will not be able to file their report without entering data.

7. COMPLETE SUMMARY TABLE

After entering data into all the applicable reporting schedules, the user must scroll to the bottom of the schedule list and click 'File This Report'. **The user is NOT officially filing the report.** They are taken to a financial summary page where they can complete their report and review the data that's already been entered.

- SCHEDULE B(13)
- SCHEDULE B(14)
- File This Report

Enter beginning cash on hand (a), total receipts for the election cycle to date (b), and total disbursements election cycle to date (c). The eFiling System will automatically calculate the total receipts and disbursements for the reporting period based on the data entry from the individual schedules. The system will also calculate the remaining balance at the close of the reporting period.

Activity	Cash Activity This Reporting Period	Election Cycle to Date
(a) Committee value at the beginning of this reporting period (i.e. ending balance from the previous reporting period)	0.000	0.000
(b) + Total receipts (from "Summary of Receipts," line 13 (cash column) for this reporting period)	0.000	0.000
(c) - Total disbursements (from "Summary of Disbursements," line 16 (cash column) for this reporting period)	481.2	481.2
(d) = Balance at close of reporting period	5883.80	

Check here if no financial activity during the reporting period. Lines (a)-(d) still must be completed, but only this cover page need be filed.

Most of these schedule summaries are automatically calculated based on the data that was entered in the individual reporting schedules. However, the following line items must be entered manually by the user:

Schedule A Lines: 11 & 12

Schedule B Lines: 4 & 13 – 15

- SCHEDULE B(13)
- SCHEDULE B(14)
- File This Report

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Disbursements	Cash	Equity
1. Disbursements for Operating Expenses	88.23	
2. Contributions Made		
(a) Candidate Committee	192.42	
(b) Political Action Committees	146.68	
(c) Political Parties		
(d) Political Party		
(e) Trade or Labor Union		
(f) Labor Organization (PAC & Political Parties Only)		
(g) Monetary Committee (Self-Administered) (Self-Administered)	246.42	
(h) Contribution Refunds Provided to the Reporting Committee	196.18	
(i) Member Contributions (Not Subject to 20% Norm 2(a))	192.52	
3. Loans		
(a) Loans Made		
(b) Loan Guarantees Made		
(c) Repayment on Loans Made		0
(d) Repayment of Loans Received		0
(e) Interest on Loans Received		0
(f) Total Loans (cash and 3(a)-(d) & 2(a)-(e) and 3(a)-(d))		0
4. Refunds and Refunds Made (Non-Contributions)		
5. Value of In-Kind Contributions Provided		
(a) Candidate Committee		
(b) Political Action Committees		
(c) Political Parties		
(d) Political Party		
(e) Trade or Labor Union		
(f) Labor Organization (PAC & Political Parties Only)		
(g) Monetary Committee (Self-Administered) (Self-Administered)		
(h) Contribution Refunds Provided to the Reporting Committee		
6. Independent Expenditures Made	296.65	
7. Political Expenditures Made		
8. Recall Expenditures Made		
9. Support Provided to Party Operations (Political Parties Only)		
10. Joint Campaign Shared Expense Payments Made		
11. Refunds/Refunds Made		
12. Outstanding Receivable (Candidate Committee)		
13. Transfer Out (Refunds/Refunds) / Transfer In (Refunds/Refunds) (Self-Administered)		
14. Miscellaneous Disbursements		
15. Aggregate of Disbursements - 20% of Cash		
16. Total Disbursements (cash and 1, 2(a)-(h), 3(a)-(d), 4, 5(a)-(h), 6, 7, 8, 9, 10, 11, 12, 13, 14, 15)	491.08	0.00

8. PREVIEW REPORT

Type in the treasurer's name and click 'PREVIEW REPORT' for the user the review the data entered

To preview this document, Adobe Reader must be installed. Adobe Reader can be found [HERE](#).

Under A.R.S. § 16-926(B)(5), a campaign finance report must be certified by the committee treasurer under penalty of perjury that the contents of the report are true and correct.

A signature submitted through electronic means shall have the same legal validity and enforceability as a manually executed signature or use of a paper-based recordkeeping system to the fullest extent permitted by applicable law and the committee hereby waives any objection to the contrary.

By filing this report, you certify that, under penalty of perjury, you have examined the contents of this report, and the contents are true and correct.

Type Name of Treasurer: Date: 9/2/2021

9. FILE REPORT

When ready to file, type in the treasurer's name and click 'I Agree/File Report'

To preview this document, Adobe Reader must be installed. Adobe Reader can be found [HERE](#).

Under A.R.S. § 16-926(B)(5), a campaign finance report must be certified by the committee treasurer under penalty of perjury that the contents of the report are true and correct.

A signature submitted through electronic means shall have the same legal validity and enforceability as a manually executed signature or use of a paper-based recordkeeping system to the fullest extent permitted by applicable law and the committee hereby waives any objection to the contrary.

By filing this report, you certify that, under penalty of perjury, you have examined the contents of this report, and the contents are true and correct.

Type Name of Treasurer: Date: 9/2/2021

HOW TO TERMINATE A COMMITTEE

1. CLICK 'eFILING'

Click 'eFiling' in the top menu.



2. CLICK 'TERMINATE'

Click 'Terminate' for the committee the user is entering data for.

Political Committee Name	Political Committee Type	Status
2022 Test CAN D2 Address: 4507 Test Lane Phoenix AZ 85004 Phone:	Candidate Committee Statement of Organization Last Filed Statement: 3/30/2021 3:54:43 PM Active Finance Reports Amendment Terminate	Current Status: Active
City of Phoenix Test PAC Address: 200 W. Washington Phoenix AZ 85003 Phone:	Political Action Committee Statement of Organization Last Filed Statement: 8/6/2021 10:29:04 AM Active Finance Reports Amendment Terminate	Current Status: Active

3. REVIEW & SUBMIT TERMINATION STATEMENT

Review the committee information, preview the Termination Statement, and select 'SUBMIT' data.

4. SIGN & PROVIDE TERMINATION STATEMENT TO CITY CLERK OFFICE

Select the printer button to download the committee Statement of Organization.



Sign the PDF and submit the signed document to the City Clerk's Office by mail, email, or fax.

Please Note: A Termination Statement will only be approved if the committee has

- 1) Filed required reports,
- 2) Has no outstanding campaign finance related fees or penalties, and
- 3) Any surplus monies have been disposed of and the committee has no cash on hand.

FREQUENTLY ASKED QUESTIONS ABOUT CAMPAIGN FINANCE REPORTING

WHEN DO I NEED TO REGISTER A COMMITTEE?

Candidates for office in the City of Phoenix must register as a Candidate Committee if the candidate receives contributions or makes expenditures, in any combination, of at least \$500 in connection with that candidacy. An entity must register as a Political Action Committee if the entity: 1) is organized for the primary purpose of influencing the result of an election; and 2) knowingly receives contributions or makes expenditures, in any combination, of at least \$1,400 in connection with any election during a calendar year. A fund that is established by a Corporation, Limited Liability Company, Labor Organization or Partnership for the purpose of influencing the result of an election shall register as a Political Action Committee. Committee qualifications can be found in A.R.S. §16-905. All committees must register with each jurisdiction in which they are active.

HOW DO I REGISTER MY COMMITTEE?

Each committee must file a Statement of Organization with the City Clerk within ten days of qualifying as a committee. Once registered, the committee must file Campaign Finance Reports. Entities that form to influence the result of an election but do not meet the monetary threshold to qualify as a committee, must keep track of all contributions received and expenditures made and are required to register with a Statement of Organization if that entity does meet the monetary threshold at any time. If any information reported on the Statement of Organization changes, the committee shall file an amended Statement of Organization reporting the change within ten days after any change in committee information. A.R.S. §16-906(C).

WHAT IS A STANDING COMMITTEE?

Committees active in more than one jurisdiction in this state that meet the definition of A.R.S. §16-901(48) must file a Statement of Organization with the Secretary of State **and** apply for status as a standing committee. This designation allows a committee to centrally file Campaign Finance Reports with the Secretary of State's office electronically rather than with every jurisdiction in which they are active.

A standing committee shall file a Statement of Organization with the Secretary of State and in each jurisdiction in which the committee is active, pursuant to A.R.S. §16-906(E), and only the Secretary of State shall issue an identification number for the committee.

DO I HAVE TO REPORT CONTRIBUTIONS AND EXPENDITURES?

All registered committees are required to file Campaign Finance Reports. The number of reports to be filed and when they are due depends on the type of committee you have registered. Campaign Finance Reports are filed on a Calendar Quarter basis, and Pre-Election and Post-Election reports are due in Calendar Quarters when there is an election. You must file a report whenever a report is required even if your committee did not have any activity. There is not a separate "NoActivity Statement." For Political Action Committees, quarterly reports are required every quarter, even when there is no election.

Candidate Committees are only required to file Campaign Finance Reports during the four calendar quarters comprising the 12-month period preceding the date of the potential Runoff Election for their office. The reporting period for a candidate committee's first campaign finance report of the election cycle must include the entire election cycle to date. A.R.S. §16-927(B)

FREQUENTLY ASKED QUESTIONS ABOUT CAMPAIGN FINANCE REPORTING – CONTINUED

WHEN ARE REPORTS DUE?

A political action committee must file campaign finance reports covering each reporting period. For a calendar quarter without an election a political action committee must file a quarterly report. Filed no later than the third Monday in the month after the Calendar Quarter complete through the last calendar quarter. For calendar quarters with an election, a political action committee must file pre-election and post-election reports. A.R.S. §16-927(A). If the filing deadline falls on a weekend or holiday, the report will be due on the next business day A.R.S. §§1-243(A), 1-301, and 1-303.

A Campaign Finance Reporting schedule is attached for your reference.

WHEN MUST I START FILING CAMPAIGN FINANCE REPORTS? WHEN CAN I STOP?

Your first Campaign Finance Report will be the required report for the reporting period during which you filed your Statement of Organization. Even if your committee was only in existence for a few days in a reporting period you still must file the next report. A.R.S. §16-927.

When you can stop filing Campaign Finance Reports depends on the date your Termination Statement was filed and approved by the City Clerk's Office. You must file Campaign Finance Reports that cover every day between the date your Statement of Organization was filed and the date your Termination Statement was finalized. Your committee is not terminated by filing a report with a zero balance or by losing an election.

HOW DO I FILE MY REPORT?

You must use the web-based [eFiling System](#) provided by the City Clerk. All contributions and expenditures must be entered into the system, using the appropriate campaign finance schedules. All committee members are encouraged to set up a user ID to log-in to the secure web-based eFiling system. A [Campaign Finance eFiling User Manual](#) is also available online for committees registered with the City of Phoenix. The User Manual contains a list of all campaign finance reporting schedules and their titles for reference. Both the eFiling System and the eFiling User Manual are available at [Phoenix.gov/Elections](#).

WHO IS RESPONSIBLE FOR FILING THE CAMPAIGN FINANCE REPORT AND MAINTAINING COMMITTEE RECORDS?

The treasurer is legally responsible for the accuracy of the report and is also the custodian of the committees' books and accounts, pursuant to A.R.S. §16-907(A).

WHAT IF I HAVE NOTHING TO REPORT?

If you filed a Statement of Organization for your political committee, but you did not receive any contributions and did not spend any money during the reporting period, you are *still* required to file a Campaign Finance Report indicating the committee had no financial activity for the applicable reporting periods.

RESOURCES

City of Phoenix Campaign Finance eFiling System

<https://apps-secure.phoenix.gov/CampaignFinance/>

City of Phoenix Campaign Finance Information Public Viewing

<https://apps-secure.phoenix.gov/CampaignFinance/Search>

Arizona Revised Statutes

[Arizona Revised Statutes \(azleg.gov\)](https://www.azleg.gov/)

Arizona Secretary of State Campaign Finance Candidate Guide

https://azsos.gov/sites/default/files/2021-2022_CF_Candidate_Handbook_FINALv2.pdf

Arizona Secretary of State Campaign Finance Political Action Committee Guide

https://azsos.gov/sites/default/files/2023-11/campaign_finance_pac_handbook_20200204_final.pdf

APPENDIX A – CAMPAIGN FINANCE REPORT SCHEDULES

RECEIPTS	
SCHEDULE A (1)(A)	MONETARY CONTRIBUTIONS RECEIVED FROM IN-STATE INDIVIDUALS - MORE THAN \$100
SCHEDULE A (1)(B)	MONETARY CONTRIBUTIONS RECEIVED FROM IN-STATE INDIVIDUALS - \$100 OR LESS (AGGREGATE)
SCHEDULE A (1)(C)	MONETARY CONTRIBUTIONS RECEIVED FROM OUT-OF-STATE INDIVIDUALS
SCHEDULE A (1)(D)	MONETARY CONTRIBUTIONS FROM CANDIDATE COMMITTEES
SCHEDULE A (1)(E)	MONETARY CONTRIBUTIONS FROM POLITICAL ACTION COMMITTEES
SCHEDULE A (1)(F)	MONETARY CONTRIBUTIONS FROM POLITICAL PARTIES
SCHEDULE A (1)(G)	MONETARY CONTRIBUTIONS FROM PARTNERSHIPS
SCHEDULE A (1)(H)	MONETARY CONTRIBUTIONS FROM CORPORATIONS AND LLCs (PACS AND POLITICAL PARTIES ONLY)
SCHEDULE A (1)(I)	MONETARY CONTRIBUTIONS FROM LABOR ORGANIZATIONS (PACS AND POLITICAL PARTIES ONLY)
SCHEDULE A(1)(J)	MONETARY CONTRIBUTIONS FROM CANDIDATE’S PERSONAL MONIES (CANDIDATE COMMITTEES ONLY)
SCHEDULE A (1)(L)	REFUNDS GIVEN BACK TO CONTRIBUTORS
SCHEDULE A (2)(A)	LOANS RECEIVED
SCHEDULE A (2)(B)	FORGIVENESS ON LOANS RECEIVED
SCHEDULE A (2)(C)	REPAYMENT ON LOANS MADE
SCHEDULE A (2)(D)	INTEREST ACCRUED ON LOANS MADE
SCHEDULE A (3)	REBATES AND REFUNDS RECEIVED
SCHEDULE A (4)	INTEREST ACCRUED ON COMMITTEE MONIES
SCHEDULE A (5)(A)	IN-KIND CONTRIBUTIONS RECEIVED FROM IN-STATE INDIVIDUALS - MORE THAN \$100
SCHEDULE A (5)(B)	IN-KIND CONTRIBUTIONS RECEIVED FROM IN-STATE INDIVIDUALS - \$100 OR LESS (AGGREGATE)
SCHEDULE A (5)(C)	IN-KIND CONTRIBUTIONS FROM OUT-OF-STATE INDIVIDUALS
SCHEDULE A (5)(D)	IN-KIND CONTRIBUTIONS FROM CANDIDATE COMMITTEES
SCHEDULE A (5)(E)	IN-KIND CONTRIBUTIONS FROM POLITICAL ACTION COMMITTEES
SCHEDULE A (5)(F)	IN-KIND CONTRIBUTIONS FROM POLITICAL PARTIES
SCHEDULE A (5)(G)	IN-KIND CONTRIBUTIONS FROM PARTNERSHIPS
SCHEDULE A (5)(H)	IN-KIND CONTRIBUTIONS FROM CORPORATIONS AND LLCs (PACS AND POLITICAL PARTIES ONLY)
SCHEDULE A (5)(I)	IN-KIND CONTRIBUTIONS FROM LABOR ORGANIZATIONS (PACS AND POLITICAL PARTIES ONLY)
SCHEDULE A (5)(J)	IN-KIND CONTRIBUTIONS FROM CANDIDATE’S PERSONAL ASSETS OR PROPERTY
SCHEDULE A (6)	IN-KIND DONATIONS RECEIVED (NON-CONTRIBUTIONS) (POLITICAL PARTIES ONLY)
SCHEDULE A (7)(A)	EXTENSIONS OF CREDIT RECEIVED
SCHEDULE A (7)(B)	PAYMENTS ON EXTENSIONS OF CREDIT RECEIVED
SCHEDULE A (8)	JOINT FUNDRAISING / SHARED EXPENSE PAYMENTS RECEIVED
SCHEDULE A (9)	PAYMENTS RECEIVED FOR GOODS / SERVICES
SCHEDULE A (10)	OUTSTANDING ACCOUNTS RECEIVABLE / DEBTS OWED TO COMMITTEE
SCHEDULE A (11)	TRANSFER IN SURPLUS MONIES / TRANSFER OUT DEBT
SCHEDULE A (12)	MISCELLANEOUS RECEIPTS

APPENDIX A – CAMPAIGN FINANCE REPORT SCHEDULES – CONT

DISBURSEMENTS	
SCHEDULE B (1)	DISBURSEMENTS FOR OPERATING EXPENSES
SCHEDULE B (2)(A)	MONETARY CONTRIBUTIONS TO CANDIDATE COMMITTEES
SCHEDULE B (2)(B)	MONETARY CONTRIBUTIONS TO POLITICAL ACTION COMMITTEES
SCHEDULE B (2)(C)	MONETARY CONTRIBUTIONS TO POLITICAL PARTIES
SCHEDULE B (2)(D)	MONETARY CONTRIBUTIONS TO PARTNERSHIPS
SCHEDULE B (2)(E)	MONETARY CONTRIBUTIONS TO CORPORATIONS AND LLCs (PACS AND POLITICAL PARTIES ONLY)
SCHEDULE B (2)(F)	MONETARY CONTRIBUTIONS TO LABOR ORGANIZATIONS (PACS AND POLITICAL PARTIES ONLY)
SCHEDULE B (2)(H)	CONTRIBUTION REFUNDS RECEIVED
SCHEDULE B (3)(A)	LOANS MADE
SCHEDULE B (3)(B)	LOAN GUARANTEES MADE
SCHEDULE B (3)(C)	FORGIVENESS ON LOANS MADE
SCHEDULE B (3)(D)	REPAYMENT ON LOANS RECEIVED
SCHEDULE B (3)(E)	INTEREST ACCRUED ON LOANS RECEIVED
SCHEDULE B (4)	REBATES AND REFUNDS MADE (NON-CONTRIBUTIONS)
SCHEDULE B (5)(A)	IN-KIND CONTRIBUTIONS TO CANDIDATE COMMITTEES
SCHEDULE B (5)(B)	IN-KIND CONTRIBUTIONS TO POLITICAL ACTION COMMITTEES
SCHEDULE B (5)(C)	IN-KIND CONTRIBUTIONS TO POLITICAL PARTIES
SCHEDULE B (5)(D)	IN-KIND CONTRIBUTIONS TO PARTNERSHIPS
SCHEDULE B (5)(E)	IN-KIND CONTRIBUTIONS TO CORPORATIONS AND LLCs (PACS AND POLITICAL PARTIES ONLY)
SCHEDULE B (5)(F)	IN-KIND CONTRIBUTIONS TO LABOR ORGANIZATIONS (PACS AND POLITICAL PARTIES ONLY)
SCHEDULE B (6)	INDEPENDENT EXPENDITURES MADE
SCHEDULE B (7)	BALLOT MEASURE EXPENDITURES MADE
SCHEDULE B (8)	RECALL EXPENDITURES MADE
SCHEDULE B (9)	SUPPORT PROVIDED TO PARTY NOMINEES (POLITICAL PARTIES ONLY)
SCHEDULE B (10)	JOINT FUNDRAISING / SHARED EXPENSE PAYMENTS MADE
SCHEDULE B (11)	REIMBURSEMENTS MADE
SCHEDULE B (12)	OUTSTANDING ACCOUNTS PAYABLE / DEBTS OWED BY COMMITTEE
SCHEDULE B (13)	TRANSFER OUT SURPLUS MONIES / TRANSFER IN DEBT
SCHEDULE B (14)	MISCELLANEOUS DISBURSEMENTS
SCHEDULE B (15)	AGGREGATE OF DISBURSEMENTS - \$250 OR LESS

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Financial Disclosure

A Guide for Completing Financial Disclosure Statements

www.azsos.gov



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1-877-THE-VOTE (843-8683)



ABOUT THIS PUBLICATION

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DUTY TO FILE FINANCIAL DISCLOSURE STATEMENT

A. Persons Required to File Financial Disclosure Statements

Two categories of persons are required to file Financial Disclosure Statements:

- Public officers who hold a political or judicial office;¹ and
- Candidates for elective office.²

Public officers and candidates file the same Financial Disclosure Statement form; the only difference is the time period covered by the Financial Disclosure Statement.

1. Public Officers

The following public officers must file an annual Financial Disclosure Statement with the Secretary of State's Office if the public officer held office at any time during the past calendar year:

- A statewide public officer, whether elected or appointed;³
- A member of the Arizona Legislature, whether elected or appointed;⁴
- A justice or judge of the Arizona Supreme Court, Arizona Court of Appeals or Superior Court, whether elected or appointed;⁵ and
- A full-time judge pro tempore, commissioner, or juvenile hearing officer serving the appellate courts or the superior court.⁶

The duty to file a Financial Disclosure Statement applies even if a person did not serve as a public officer during the entire year. A Financial Disclosure Statement must be filed if during the previous year a person:

- Qualified as a public officer but did not yet assume office;⁷
- Was elected or appointed and began serving in office; or
- Served in public office but resigned, retired, or left office for any reason.

¹ A "public officer" is defined as "a member of the legislature and any judge of the court of appeals or the superior court, or a person holding an elective office the constituency of which embraces the entire geographical limits of this state." [A.R.S. § 38-541\(8\)](#). A "local public officer" is defined as "a person holding an elective office of an incorporated city or town, a county or a groundwater replenishment district established under title 48, chapter 27." [A.R.S. § 38-541\(6\)](#).

² [A.R.S. § 18-444\(D\)](#).

³ [A.R.S. § 38-541\(8\)](#).

⁴ [A.R.S. § 38-541\(8\)](#).

⁵ [A.R.S. § 38-541\(8\)](#). Supreme Court justices are not expressly mentioned in statute but are required to file Financial Disclosure Statements by virtue of Ariz. Code of Jud. Conduct, Rule 3.15.

⁶ Ariz. Supr. Ct. Admin Order 2012-93; Ariz. Code Jud. Admin. § 1-307.

⁷ [A.R.S. § 18-444\(D\)](#). For example, a member of the Legislature "qualifies" as a public officer in November of the previous calendar year but does not assume office until January of the following year.

However, an exception exists for a public officer whose final term of office expires less than 31 days into the immediately following calendar year. In this case, a departing public officer may file his or her final Financial Disclosure Statement between January 1st and January 31st of the year in which they leave office instead of waiting for the following year.⁸ In other words, for those public officers whose final term will end in January, their annual Financial Disclosure Statement should cover the entire previous calendar year *and* include any financial activity from January 1st of the current year through the date the public officer officially leaves office. This allows departing public officers to take care of all remaining reporting obligations at once.

Local public officers are also required to file Financial Disclosure Statements.⁹

2. Candidates for Elective Office

A candidate for a statewide or legislative office must also file a Financial Disclosure Statement with the Secretary of State at the same time he or she files a nomination paper to run for public office.¹⁰ Federal candidates are exempt from filing a Financial Disclosure Statement with the Secretary of State's Office.¹¹

Local candidates (other than precinct committeemen) are also required to file a Financial Disclosure Statement with the appropriate local filing officer.¹²

Filing a candidate-related Financial Disclosure Statement does not obviate the need to also file an annual Financial Disclosure Statement in accordance with the section outlined above.

B. Acquiring an Authorized Financial Disclosure Statement Form

1. Statewide, Legislative and Judicial Public Officers and Candidates Filing with the Secretary of State

The Secretary of State's Office has implemented an online wizard to facilitate completion of the Financial Disclosure form, which allows filer information to be stored from year-to-year for use in future filings. To complete and submit the form via the Secretary of State's Candidate Portal, please visit: <https://apps.azsos.gov/apps/election/candidateportal>.

Public officers filing with the Secretary of State may reference their historical annual Financial Disclosure Statements here: go.azsos.gov/FDSHistorical.

⁸ [A.R.S. § 18-444\(D\)](#).

⁹ State law requires counties and incorporated cities and towns to adopt their own standards for Financial Disclosure Statements.⁹ Such jurisdictions may tailor their Financial Disclosure Statements for local needs. A local public officer should check with the clerk or the filing office where candidates file nomination papers in a particular local jurisdiction for more information.

¹⁰ [A.R.S. § 16-311\(I\)](#); [A.R.S. § 16-312\(C\)](#); [A.R.S. § 16-341\(K\)](#); [A.R.S. § 38-543](#).

¹¹ [A.R.S. § 38-541\(8\)](#).

¹² [A.R.S. § 16-311\(I\)](#); [A.R.S. § 16-312\(C\)](#); [A.R.S. § 16-341\(K\)](#); [A.R.S. § 38-543](#).

2. Local Public Officers and Candidates

Local public officers and candidates should contact the appropriate clerk or election filing office for information on obtaining a local Financial Disclosure Statement form.

C. Deadlines for Filing A Financial Disclosure Statement

1. Public Officers

a. Annual Filing Requirement

A person who served as a public officer at any time during a calendar year must file an annual Financial Disclosure Statement between January 1st and January 31st of the following calendar year.¹³

However, an exception exists for a public officer whose final term of office expires less than 31 days into the immediately following calendar year. In this case, a departing public officer may file his or her final Financial Disclosure Statement between January 1st and January 31st of the year in which they leave office instead of waiting for the following year.¹⁴

b. Requirement for Newly-Appointed Public Officers

In addition to filing an annual Financial Disclosure Statement, a newly appointed public officer (whether as a judicial official or to fill a vacancy in a statewide or a legislative office) must file a Financial Disclosure Statement within 60 days of the date of assuming office.¹⁵ This Financial Disclosure Statement must cover the previous consecutive 12-month period, ending with the last full month prior to the date of assuming office.

If a public officer was appointed in January, he or she need only file *one* Financial Disclosure Statement because both the previous 12-month and annual reporting obligations will be satisfied. Otherwise, a newly-appointed public officer must file an annual Financial Disclosure Statement in January even if he or she recently filed a Financial Disclosure Statement upon appointment late in the previous calendar year.

2. Candidates for Elective Office

A candidate for elective office (other than a candidate for federal office or precinct committeeman) must file a Financial Disclosure Statement at the same time he or she files a nomination paper.¹⁶ For a candidate seeking nomination through a primary election, the nomination paper typically must be filed between 120 days and 150 days before the election.¹⁷

¹³ [A.R.S. § 18-444\(D\)](#).

¹⁴ [A.R.S. § 18-444\(D\)](#).

¹⁵ [A.R.S. § 18-444\(D\)](#).

¹⁶ [A.R.S. § 16-311\(I\)](#); [A.R.S. § 16-312\(C\)](#); [A.R.S. § 16-341\(K\)](#); [A.R.S. § 38-543](#).

¹⁷ [A.R.S. § 16-311\(A\)](#); *but see* [A.R.S. § 16-312\(B\)](#) (write-in candidates); [A.R.S. § 16-951\(B\)](#) (statewide and legislative candidates seeking public funding).

A judicial applicant for merit selection to the Superior Court does not need to file a Financial Disclosure Statement in conjunction with such application.

D. Where to File a Financial Disclosure Statement

1. Public Officers

The following public officers must file an annual Financial Disclosure Statement (or a Financial Disclosure Statement within 60 days of being newly appointed as a public office) with the Secretary of State's Office:

- A statewide public officer, whether elected or appointed;¹⁸
- A member of the Arizona Legislature, whether elected or appointed;¹⁹
- A justice or judge of the Arizona Supreme Court, Arizona Court of Appeals or Superior Court, whether elected or appointed;²⁰ and
- A full-time judge pro tempore, commissioner, or juvenile hearing officer serving the appellate courts or the superior court.²¹

A local public officer must file a Financial Disclosure Statement with the filing officer designated by local charter, ordinance, or resolution.

2. Candidates for Elective Office

A statewide or legislative candidate must file a Financial Disclosure Statement with the Secretary of State's Office.²² A local candidate (other than a candidate for precinct committeeman) must file a Financial Disclosure Statement with the officer in charge of elections with whom nomination papers must be filed for the office in question.²³

E. Enforcement

Upon referral by the Secretary of State, the Attorney General enforces the filing requirement against statewide, legislative or judicial public officers who fail to file by the statutory deadline.²⁴ Enforcement may include a civil penalty of \$50 for each day the Financial Disclosure Statement is late (up to \$500) until the Statement is filed.²⁵ Failure to file a Financial Disclosure Statement at the local level may result in referral to a local enforcement officer.

In addition, any public officer or candidate found to have knowingly filed an incomplete or a false Financial

¹⁸ [A.R.S. § 38-541\(8\)](#).

¹⁹ [A.R.S. § 38-541\(8\)](#).

²⁰ [A.R.S. § 38-541\(8\)](#). Supreme Court justices are not expressly mentioned in statute but are required to file Financial Disclosure Statements by virtue of Ariz. Code of Jud. Conduct, Rule 3.15.

²¹ Ariz. Supr. Ct. Admin. Order 2012-93; Ariz. Code Jud. Admin. § 1-307.

²² [A.R.S. § 16-311\(I\)](#).

²³ [A.R.S. § 15-393\(A\)\(4\), \(C\)\(5\)](#); [A.R.S. § 15-422\(A\)](#); [A.R.S. § 15-431\(B\)\(6\)](#); [A.R.S. § 15-1442\(A\)](#); [A.R.S. § 16-311\(F\)](#).

²⁴ [A.R.S. § 38-544\(B\)](#) (indicating the violations will be enforced according to the same standards as campaign finance complaints); see also [A.R.S. §§ 16-937](#) to [16-938](#) (campaign finance enforcement provisions).

²⁵ [A.R.S. § 38-544\(B\)](#).

Disclosure Statement may be found guilty of a class 1 misdemeanor.²⁶

Please note, the Secretary of State's Office or other local officer in charge of elections may refuse to accept a nomination paper from a candidate who fails to file an accompanying candidate-related Financial Disclosure Statement.²⁷

F. Laws Governing Financial Disclosure Statements

Arizona Revised Statutes § 18-444, § 38-541, and §§ 38-543 to 38-545 govern Financial Disclosure Statements for public officers.

The Arizona Code of Judicial Conduct, Rule 3.15, Arizona Code of Judicial Administration, § 1-307, and Arizona Supreme Court Administrative Order 2012-93 govern Financial Disclosure Statements by Arizona justices, judges and full-time judge pro tems, commissioners, and juvenile hearing officers.

Counties, cities, and towns may have additional charter provisions, ordinances, or resolutions that govern the filing of Financial Disclosure Statements by local public officers and candidates.

²⁶ [A.R.S. § 38-544\(A\)](#).

²⁷ [A.R.S. § 16-311\(I\)\(1\)](#).

COMPLETING A FINANCIAL DISCLOSURE STATEMENT

A Financial Disclosure Statement requires the disclosure of your personal and business financial interests. You must answer all the questions on the Financial Disclosure Statement unless the question is inapplicable.

You must not only disclose financial information about yourself, but about your household members' financial interests as well. A member of your household is defined as:

- A spouse who resides in your household; and
- Any children 18 years old and younger who reside in your household (full or part time) and over whom you have joint or sole legal custody.

You are not required to identify your spouse or minor children by name. However, if you do choose to identify household members by name, the Secretary of State (or other local filing officer) will not redact that information in any internet posting or in response to any public request for your Financial Disclosure Statement. All information in a Financial Disclosure Statement is a public record.

A. Personal Financial Interests

1. Sources of Personal Compensation

You must provide the name and address of each employer or other source of compensation who paid you or any member of your household more than \$1,000 in salary, wages, commissions, tips or other forms of compensation (other than “gifts” discussed further below) during the period covered by the Financial Disclosure Statement. You must also describe the nature of each employer’s business and the type of services for which you or a member of your household were compensated.

You must also disclose indirect sources of compensation exceeding \$1,000 in cases where a third-party (outside your household) received anything of value for your or a member of your household’s use or benefit. For example, if a person was paid by a third-party to be your personal housekeeper, you must identify the name and address of the person that performed the services that benefitted you, describe the nature of that person’s services, and provide the name and address of the third-party who paid for the services on your behalf.

However, you need not disclose income of a business in this section, including money you or any member of your household received that constitutes income paid to a business that you or your household member owns or does business as (such as a sole proprietorship). This type of business income will be disclosed in the section relating to Business Financial Interests.²⁸

2. Professional, Occupational and Business Licenses

You must disclose all professional, occupational or business licenses held by you or any member of your

²⁸ This information is disclosed in Question 12 of the Financial Disclosure Statement form.

household at any time during the period covered by the Financial Disclosure Statement. For example, if you hold a law license (whether active or inactive), you must identify the type of license, the person in the household that holds that license, and the jurisdiction or entity that issued the license.

This includes licenses in which you or a member of your household had an “interest,” which includes (but is not limited to) any business license held by a “controlled” or “dependent” business as defined in Question 11 below.

3. Personal Creditors

You must disclose the name and address of each creditor to whom you or a member of your household owed a qualifying personal debt over \$1,000 during any point during the period covered by the Financial Disclosure Statement. A “qualifying” debt is a personal debt *other than* the following types of debts:

- Debts resulting from the ordinary conduct of a business;²⁹
- Debts on any personal residence or recreational property;
- Debts on motor vehicles used primarily for personal (not commercial) purposes;
- Debts secured by cash values on life insurance;
- Debts owed to relatives; or
- Personal credit card transactions or the value of any retail installment contracts you or your household member entered into.

Additionally, if the qualifying personal debt was either incurred for the first time or completely discharged (paid in full) during the period covered by the Financial Disclosure Statement, you must identify the date and disclose whether the debt was incurred or discharged

4. Personal Debtors

You must disclose the name of each debtor who owed you or a member of your household a debt over \$1,000 at any time during the period covered by the Financial Disclosure Statement, along with the approximate value of the debt by financial category:

- \$1,000 to \$25,000;
- \$25,001 to \$100,000; or
- \$100,001 +

Additionally, if the qualifying personal debt was either incurred for the first time or completely discharged (paid in full) during the period covered by the Financial Disclosure Statement, you must identify the date and disclose whether the debt was incurred or discharged.

5. Gifts

You must disclose the name of any donor who gave you or a member of your household a gift (or an

²⁹ This information is disclosed in Question 12 of the Financial Disclosure Statement form.

accumulation of gifts) during the preceding calendar year with a cumulative value over \$500, subject to the exceptions listed below. A “gift” is defined as a gratuity (tip), special discount, favor, hospitality, service, economic opportunity, loan or other benefit received without adequate consideration or reciprocal value and not provided to members of the public at large. In other words, a gift is a personal benefit you or your household member received without providing an equivalent benefit in return.

You need not disclose the following as gifts:

- Gifts received by will;
- Gift received by intestate succession (in other words, gifts distributed to you or a household member according to Arizona’s intestate succession laws, not by will);
- Gift distributed from an *inter vivos* (living) or testamentary (by will) trust established by a spouse or family member;
- Gifts received from any other member of the household;
- Gifts received from parents, grandparents, siblings, children and grandchildren; or
- Political campaign contributions reported on campaign finance reports.

Please note, the concept of a “gift” for purposes of a Financial Disclosure Statement is separate and distinct from the gift restrictions outlined in Arizona’s lobbying statutes. Thus, disclosure in a lobbying report does not relieve you or a member of your household’s duty to disclose qualifying gifts in this Financial Disclosure Statement.

6. Offices, Positions or Fiduciary Relationships in Businesses, Nonprofit Organizations or Trusts

You must disclose the name and address of each business, organization, trust or nonprofit organization or association in which you or any member of your household held any office, position, or fiduciary relationship during the period covered by the Financial Disclosure Statement, including a description of the office, position or relationship.

7. Ownership or Financial Interests in Businesses, Trusts or Investment Funds

You must disclose the name and address of each business, trust, or investment fund in which you or any member of your household had an ownership or beneficial interest of over \$1,000 during the period covered by the Financial Disclosure Statement, along with the approximate value of the interest by financial category:

- \$1,000 to \$25,000;
- \$25,001 to \$100,000; or
- \$100,001 +

The types of investment funds that must be disclosed include stocks, annuities, mutual funds, or retirement funds. Business investments include any financial interest in a limited liability company, partnership, joint venture, or sole proprietorship.

8. Ownership of Bonds

You must disclose any bonds issued by a state or local government agency worth more than \$1,000 that you or a member of your household held during the period covered by the Financial Disclosure Statement, along with the approximate value of the bonds by financial category:

- \$1,000 to \$25,000;
- \$25,001 to \$100,000; or
- \$100,001 +

Additionally, if the bonds were either acquired for the first time or completely divested (sold in full) during the period covered by the Financial Disclosure Statement, you must identify the date and disclose whether the bonds were first acquired or fully divested.

9. Real Property Ownership

You must disclose any Arizona land and improvements (other than your primary residence or property you use for personal recreation) which was owned by you or a member of your household during the period covered by the Financial Disclosure Statement, along with the approximate value of the land by financial category:

- \$1,000 to \$25,000;
- \$25,001 to \$100,000; or
- \$100,001 +

You must also describe the property's location (city and state) and its approximate size (acreage or square footage).

Additionally, if the land was either acquired for the first time or completely divested (sold in full) during the period covered by the Financial Disclosure Statement, you must identify the date and disclose whether the land was first acquired or fully divested.

10. Travel Expenses

You must disclose the name and location of each meeting, conference, or other event you traveled to and participated in during the period covered by the Financial Disclosure Statement, if the following conditions were met:

- You participated in the meeting, conference, or other event in your official capacity as a public officer or candidate; and

- At least \$1,000 in travel-related expenses were incurred on your behalf, regardless of whether the expenses were directly paid by a third-party or you were reimbursed by a third-party.³⁰

Travel-related expenses include airfare, gas, lodging, meals, and other associated fees.

If the travel-related expenses exceeded \$1,000 for a particular meeting, conference, or other event, you must disclose the approximate value of the total expenses:

- \$1,000 to \$25,000;
- \$25,001 to \$100,000; or
- \$100,001 +

You do not need to disclose any personal monies you expended related to travel or any other personal expenses you incurred while traveling.³¹

B. Business Financial Interests

1. Business Names

You must disclose the name of any business under which you or any member of your household owns or did business (including if you or your household member were self-employed) during the period covered by the Financial Disclosure Statement, which includes any corporations, limited liability companies, partnerships, sole proprietorships or any other type of business conducted under a trade name.

You must also disclose whether the named business is “controlled” or “dependent.” A business is “controlled” if you or any member of your household (individually or combined) had an ownership interest that amounts to more than 50%. On the other hand, a business is “dependent” if:

- You or any household member (individually or combined) had an ownership interest that amounts more than 10% in the business;
- The business received more than \$10,000 from a single source during the period covered by the Financial Disclosure Statement; and
- The \$10,000 or more in income from the single source amounted to more than 50% of the business’ gross income for the period covered by the Financial Disclosure Statement.

If a business is both “controlled” and “dependent,” it should be classified as such in the Financial Disclosure Statement.

Please note, the remaining questions in the Business Financial Interests section of the Financial Disclosure Statement only relate to controlled and dependent businesses. If you disclosed the name of a business interest in Question 12 but that business is neither “controlled” nor “dependent,” the remaining questions in the Financial Disclosure Statement need not be answered.

³⁰ A meeting, conference, or other event qualifies for potential disclosure regardless of whether the travel-related expenses were paid by an interest group, lobbyist, association, or the public officer’s or candidate’s own employer.

³¹ A public officer or candidate who was accompanied by a protective security detail at government expense need not disclose any travel-related expenses for the security detail.

2. Controlled Business Information

If you designated a business as “controlled” in Question 12 of the Financial Disclosure Statement, you must disclose the goods or services provided by the controlled business.

You must also disclose whether the controlled business has a “major client,” which applies if the following conditions are met:

- A single client or customer (whether a person or business) that accounted for more than \$10,000 in income during the period covered by the Financial Disclosure Statement; and
- The business income received from a single client or customer constitutes at least 25% of the controlled business’ gross income during the period covered by the Financial Disclosure Statement.

If the controlled business’ client or customer is deemed a “major client,” you must describe what services your controlled business provided to the major client (but you need not identify the major client by name). If the major client is a business, you must also describe the major client’s type of business activities.

3. Dependent Business Information

If you designated a business as “dependent” in Question 12 of the Financial Disclosure Statement, you must disclose the goods or services provided by the dependent business.

You must also disclose whether the dependent business has a “major client,” which applies if the following conditions are met:

- A single client or customer (whether a person or business) that accounted for more than \$10,000 in income during the period covered by the Financial Disclosure Statement; and
- The business income received from a single client or customer constituted at least 25% of the dependent business’ gross income during the period covered by the Financial Disclosure Statement.

If the dependent business’ client or customer is deemed a “major client,” you must describe what services your dependent business provided to the major client (but you need not identify the major client by name). If the major client is a business, you must also describe the major client’s type of business activities.

4. Real Property Owned by a Controlled or Dependent Business

You must disclose any Arizona land, and improvements to this land, which was owned by a controlled or dependent business during the period covered by the Financial Disclosure Statement, along with the approximate value of the land by financial category:

- \$1,000 to \$25,000;
- \$25,001 to \$100,000; or
- \$100,001 + ³²

³² If the business is one that primarily deals in real property and improvements, you should select the category that corresponds to the aggregate value of all parcels held by the business during the period covered by the Financial Disclosure Statement.

You must also describe the property's location (city and state) and its approximate size (acreage or square footage).

Additionally, if the land was either acquired for the first time or completely divested (sold in full) during the period covered by the Financial Disclosure Statement, you must identify the date and disclose whether the land was first acquired or fully divested.

5. Controlled or Dependent Business' Creditors

You must disclose whether a controlled or dependent business has a "major creditor," which applies if the following conditions are met:

- The controlled or dependent business owed a debt of more than \$10,000 to a single creditor (whether a person or business) during the period covered by the Financial Disclosure Statement; and
- The debt owed by a controlled or dependent business to a single creditor constituted at least 30% of the controlled or dependent business' total indebtedness at any time during the period covered by the Financial Disclosure Statement.

If the controlled or dependent business' creditor is deemed a "major creditor," you must disclose the name and address of the creditor.

Additionally, if the debt was either incurred for the first time or completely discharged (paid in full) during the period covered by the Financial Disclosure Statement, you must identify the date and disclose whether the debt was incurred or discharged.

6. Controlled or Dependent Business' Debtors

You must disclose whether a controlled or dependent business has a "major debtor," which applies if the following conditions are met:

- The controlled or dependent business is owed a debt of more than \$10,000 by a single debtor (whether a person or business) during the period covered by the Financial Disclosure Statement; and
- The debt owed to a controlled or dependent business by a single debtor constituted at least 30% of the total indebtedness owed to the controlled or dependent business at any time during the period covered by the Financial Disclosure Statement.

If the controlled or dependent business' debtor is deemed a "major debtor," you must disclose the name of the debtor, along with the approximate value of the debt by financial category:

- \$1,000 to \$25,000;
- \$25,001 to \$100,000; or
- \$100,001 +

Additionally, if the debt was either incurred for the first time or completely discharged (paid in full) during the period covered by the Financial Disclosure Statement, you must identify the date and disclose whether the debt was incurred or discharged.

LAWS GOVERNING FINANCIAL DISCLOSURE

A. Arizona Revised Statutes

A.R.S. § 18-444. Duty to file financial disclosure statement; contents; exceptions

A. In addition to other statements and reports required by law, every public officer, as a matter of public record, shall file with the secretary of state on a form prescribed by the secretary of state a verified financial disclosure statement covering the preceding calendar year. The statement shall disclose:

1. The name and home or work address of the public officer, whether the public officer's spouse is a member of the public officer's household, the number of minor children who are members of the public officer's household and all names and addresses under which each does business. If disclosure of the identity of the public officer's spouse or minor child would otherwise be required, a public officer may comply with the identification requirement by using the term "spouse" or "minor child", as applicable.
2. The name and address of each employer and of each other source of compensation other than gifts amounting to more than one thousand dollars received during the preceding calendar year by the public officer and members of his household in their own names, or by any other person for the use or benefit of the public officer or members of his household, a description of the services for which the compensation was received and the nature of the employer's business. This paragraph shall not be construed to require the disclosure of individual items of compensation that constituted a portion of the gross income of the business from which the public officer or members of his household derived compensation.
3. For a controlled business, a description of the goods or services provided by the business, and if any single source of compensation to the business during the preceding calendar year amounts to more than ten thousand dollars and is more than twenty-five percent of the gross income of the business, the disclosure shall also include a description of the goods or services provided to the source of compensation. For a dependent business the statement shall disclose a description of the goods or services provided by the business and a description of the goods or services provided to the source of compensation from which the dependent business derived the amount of gross income described in § 38-541, paragraph 4. If the source of compensation for a controlled or dependent business is a business, the statement shall disclose a description of the business activities engaged in by the source of compensation.
4. The names and addresses of all businesses and trusts in which the public officer or members of his household, or any other person for the use or benefit of the public officer or members of his household, had an ownership or beneficial interest of over one thousand dollars at any time during the preceding calendar year, and the names and addresses of all businesses and trusts in which the public officer or any member of his household held any office or had a fiduciary relationship at any time during the preceding calendar year, together with the amount or value of the interest and a description of the interest, office or relationship.
5. All Arizona real property interests and real property improvements, including specific location and approximate size, in which the public officer, any member of his household or a controlled or dependent business held legal title or a beneficial interest at any time during the preceding calendar year, and the value of any such interest, except that this paragraph does not apply to a real property interest and improvements

thereon used as the primary personal residence or for the personal recreational use of the public officer. If a public officer, any member of his household or a controlled or dependent business acquired or divested any such interest during the preceding calendar year, he shall also disclose that the transaction was made and the date it occurred. If the controlled or dependent business is in the business of dealing in real property interests or improvements, disclosure need not include individual parcels or transactions as long as the aggregate value of all parcels of such property is reported.

6. The names and addresses of all creditors to whom the public officer or members of his household, in their own names or in the name of any other person, owed a debt of more than one thousand dollars or to whom a controlled business or a dependent business owed a debt of more than ten thousand dollars which was also more than thirty percent of the total business indebtedness at any time during the preceding calendar year, listing each such creditor. This paragraph shall not be construed to require the disclosure of debts owed by the public officer or any member of his household resulting from the ordinary conduct of a business other than a controlled or dependent business nor shall disclosure be required of credit card transactions, retail installment contracts, debts on residences or recreational property exempt from disclosure under paragraph 5 of this subsection, debts on motor vehicles not used for commercial purposes, debts secured by cash values on life insurance or debts owed to relatives. It is sufficient disclosure of a creditor if the name and address of a person to whom payments are made is disclosed. If the public officer, any member of his household or a controlled or dependent business incurred or discharged a debt which is reportable under this subsection during the preceding calendar year, the report shall disclose that the transaction was made and the date it occurred.

7. The identification and amount of each debt exceeding one thousand dollars owed at any time during the preceding calendar year to the public officer and members of his household in their own names, or to any other person for the use or benefit of the public officer or any member of his household. The disclosure shall include the identification and amount of each debt exceeding ten thousand dollars to a controlled business or dependent business which was also more than thirty percent of the total indebtedness to the business at any time during the preceding calendar year. This paragraph shall not be construed to require the disclosure of debts from the ordinary conduct of a business other than a controlled or dependent business. If the public officer, any member of his household or a controlled or dependent business incurred or discharged a debt which is reportable under this subsection during the preceding year, the report shall disclose that the transaction was made and the date it occurred.

8. The name of each source of any gift, or accumulated gifts from a single source, of more than five hundred dollars received by the public officer and members of his household in their own names during the preceding calendar year, or by any other person for the use or benefit of the public officer or any member of his household except gifts received by will or by virtue of intestate succession, or received by way of distribution from any inter vivos or testamentary trust established by a spouse or by an ancestor, or gifts received from any other member of the household or relatives to the second degree of consanguinity.

9. A list of all business licenses issued to, held by or in which the public officer or any member of his household had an interest at any time during the preceding calendar year, including the name in which the license was issued, the type of business and its location.

10. A list of all bonds, together with their value, issued by this state or any political subdivision of this state and held at any time during the preceding calendar year by the public officer or any member of his household, which bonds issued by a single entity had a value in excess of one thousand dollars. If the public officer or any

member of his household acquired or divested any bonds during the preceding calendar year which are reportable under this paragraph, the fact that the transaction occurred and the date shall also be shown.

11. The name of each meeting, conference or other event where the public officer is participating in the public officer's official capacity if travel-related expenses of one thousand dollars or more were incurred on behalf of the public officer and the travel-related expenses are not paid by the public officer.

B. If an amount or value is required to be reported pursuant to this section, it is sufficient to report whether the amount or value of the equity interest falls within:

1. Category 1, one thousand dollars to twenty-five thousand dollars.
2. Category 2, more than twenty-five thousand dollars to one hundred thousand dollars.
3. Category 3, more than one hundred thousand dollars.

C. This section does not require the disclosure of any information that is privileged by law.

D. The statement required to be filed pursuant to subsection A shall be filed by all persons who qualified as public officers at any time during the preceding calendar year on or before January 31 of each year with the exceptions that a public officer appointed to fill a vacancy shall, within sixty days following his taking of such office, file a financial disclosure statement covering as his annual period the twelve month period ending with the last full month prior to the date of his taking office, and a public officer whose final term expires less than thirty-one days into the immediately following calendar year may file the public officer's final financial disclosure at the same time as the disclosure for the last immediately preceding year.

E. The secretary of state shall prepare written guidelines, forms and samples for completing the financial disclosure statement required by this section. A copy of the guidelines, forms and samples shall be distributed to each public officer and shall be made available to each candidate required to file a financial disclosure statement pursuant to § 38-543.

F. Beginning January 1, 2017, the statement required to be filed in subsection D of this section may be filed by the public officer in a form prescribed by the secretary of state that includes authorization for future filings to be submitted in an electronic format. Any subsequent filings required to be filed in subsection D of this section may be filed in an electronic format as prescribed by the secretary of state. Beginning January 1, 2017, any statements that are required to be filed by a local public officer pursuant to an ordinance, rule, resolution or regulation adopted pursuant to § 38-545 may be filed in an electronic format as prescribed by the secretary of state.

A.R.S. § 38-541. Definitions

In this chapter, unless the context otherwise requires:

1. "Business" includes any enterprise, organization, trade, occupation or profession, whether or not operated as a legal entity or for profit, including any business trust, corporation, partnership, joint venture or sole proprietorship.
2. "Compensation" means anything of value or advantage, present or prospective, including the forgiveness of debt.

3. “Controlled business” means any business in which the public officer or any member of his household has an ownership or beneficial interest, individually or combined, amounting to more than a fifty percent interest.
4. “Dependent business” means any business in which the public officer or any member of his household has an ownership or beneficial interest, individually or combined, amounting to more than a ten percent interest, and during the preceding calendar year the business received from a single source more than ten thousand dollars and more than fifty percent of its gross income.
5. “Gift” includes any gratuity, special discount, favor, hospitality, service, economic opportunity, loan or other benefit received without equivalent consideration and not provided to members of the public at large. Gift does not include:
 - (a) Travel-related expenses that are publicly reported pursuant to this article.
 - (b) Political campaign contributions that are publicly reported pursuant to title 16, chapter 6.
6. “Local public officer” means a person holding an elective office of an incorporated city or town, a county or a groundwater replenishment district established under title 48, chapter 27.¹
7. “Member of household” means a public officer's spouse and any minor child of whom the public officer has legal custody.
8. “Public officer” means a member of the legislature and any judge of the court of appeals or the superior court, or a person holding an elective office the constituency of which embraces the entire geographical limits of this state. Members of Congress are not public officers as defined in this paragraph.
9. “Travel-related expenses” means any costs associated with transportation, food, lodging and registration fees and other expenses directly related to travel to or from a meeting, conference or other event where the public officer is participating in the public officer's official capacity.

A.R.S. § 38-543. Duty to file financial disclosure statement by candidate for public office

A candidate for public office as specified in § 38-541, paragraph 8 shall file a financial disclosure statement covering the preceding twelve-month period and containing the information described in § 18-444 on a form prescribed by the secretary of state at the time of filing of nomination papers.

A.R.S. § 38-544. Violation; classification

A. Any public officer, local public officer or candidate who knowingly fails to file a financial disclosure statement required pursuant to § 18-444, 38-543 or 38-545, who knowingly files an incomplete financial disclosure statement or who knowingly files a false financial disclosure statement is guilty of a class 1 misdemeanor.

B. Any public officer, local public officer or candidate who violates this chapter is subject to a civil penalty of fifty dollars for each day of noncompliance but not more than five hundred dollars that may be imposed as prescribed in §§ 16-937 and 16-938.

A.R.S. § 38-545. Local public officers financial disclosure

Notwithstanding the provisions of any law, charter or ordinance to the contrary, every incorporated city or town or county shall by ordinance, rule, resolution or regulation adopt standards of financial disclosure consistent with the provisions of this chapter applicable to local public officers.

B. Arizona Supreme Court Administrative Orders

IN THE SUPREME COURT OF THE STATE OF ARIZONA

In the Matter of:)	
)	
ARIZONA CODE OF JUDICIAL)	Administrative Order
ADMINISTRATION § 1-307:)	<u>No. 2012 - 93</u>
SPECIAL JUDICIAL OFFICER)	
FINANCIAL DISCLOSURE)	
_____)	

The above-captioned provision implements the recommendations of the Presiding Judges and the Committee on Superior Court to uniformly apply to judges pro tempore, commissioners, and juvenile hearing officers the duty to file financial disclosure statements as provided by A.R.S. § 35-542 consistent with the purposes of financial disclosure statutes and the Code of Judicial Conduct. The above-captioned provision having come before the Arizona Judicial Council on June 18, 2012, and having been approved and recommended for adoption,

Therefore, pursuant to Article VI, Section 3, of the Arizona Constitution,

IT IS ORDERED that the above-captioned provision, attached hereto, is adopted as a section of the Arizona Code of Judicial Administration, effective January 1, 2013.

Dated this 5th day of December, 2012.

REBECCA WHITE BERCH
Chief Justice

C. Arizona Code of Judicial Administration

ARIZONA CODE OF JUDICIAL ADMINISTRATION
Part 1: Judicial Branch Administration
Chapter 3: Judicial Officers and Employees
Section 1-307: Special Judicial Officer Financial Disclosure

A. Definitions. In this section the following definitions apply:

“Commissioner” means a person appointed pursuant to A.R.S. § 12-213.

“Judge pro tempore” means a person appointed pursuant to Article 6, § 3 of the Arizona Constitution and A.R.S. §§ 12-141 or 12-145.

“Juvenile hearing officer” means a person appointed pursuant to A.R.S. § 8-323.

B. Applicability. All judges pro tempore serving an appellate court or the superior court and all commissioners and juvenile hearing officers serving the superior court on a full time basis.

C. Purpose. To uniformly apply the duty to file financial disclosure statements as provided by A.R.S. § 38-541 et. seq. to full time judges pro tempore, commissioners and juvenile hearing officers consistent with the purposes of the financial disclosure statutes and Rule 3.15 of the Code of Judicial Conduct.

D. Reporting Procedures.

1. Full time judges pro tempore, commissioners and juvenile hearing officers shall file a financial disclosure statement as provided by A.R.S. § 38-541 et. seq. upon appointment and annually. Financial disclosure statements cover the entire year served, January 1 through December 31, even if service was for only one day.
2. Pursuant to A.R.S. § 38-542(E), financial disclosure statements shall be filed between January 1 and January 31 and delivered or mailed to Arizona Secretary of State, Attn: Election Services Division, 1700 West Washington Street, 7th Floor, Phoenix, Arizona 85007.
3. Financial disclosure packets may be obtained from the presiding judge or court administrator or upon request from the Secretary of State Election Services. Printable versions are available through the Secretary of State web site www.azsos.gov.

D. Arizona Code of Judicial Conduct

Rule 3.15. Financial Reporting Requirements

(A) A judge shall file annually the financial disclosure statement required by A.R.S. § 38-542 or other applicable law. The completion and filing of the annual financial disclosure statement fulfills the reporting requirements set forth in this code.

(B) Reports made in compliance with this rule shall be filed as public documents in the office designated by law.

COMMENT

1. The information required to be reported by Rules 3.12, 3.13, and 3.14 is a portion of the information that must be included on the annual financial disclosure statement mandated by A.R.S. § 38-542 or other applicable law. A judge is obligated to disclose fully and accurately all information requested on the annual disclosure statement and does not fulfill the statutory obligation by reporting only the information required by Rules 3.12, 3.13, and 3.14. Applicable law requires sufficient disclosure of the financial interests of and gifts to a judge and members of his or her household to promote judicial accountability and integrity.

2. To avoid needless repetition of disclosure requirements, the Arizona judiciary deems compliance with the substantive legal requirement as sufficient to meet the ethical obligations of a judge and thus incorporates them in this code.



Arizona Petition Circulator Training Guide

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I. Introduction

This Guide explains the registration requirements for individuals who intend to circulate petitions, offers guidance on the signature collection process, provides an overview of the signature verification process once a petition has been filed, and covers acts that are prohibited conduct for circulators during the signature collection and petition filing process. For more information, please visit:

Website: <https://azsos.gov/elections/requirements-paid-non-resident-circulators>

Circulator Portal: <https://apps.azsos.gov/apps/election/circulatorportal/>

For questions please contact:

Email: circulator@azsos.gov

Phone: (602) 542- 8683

Toll Free: 1-877-THE-VOTE

Address: Office of the Secretary of State
Elections Division
1700 W Washington St. Fl. 7
Phoenix, AZ 85007

A. Overview of Petition Types

Circulators may gather signatures for the following: (1) candidate nomination petitions; (2) petitions for new party recognition; and/or (3) initiative, referendum, or recall petitions. This section provides a general overview of each type of petition.

Candidate Nomination

A candidate may run for office by one of two methods: obtaining a nomination or running as a write-in candidate.¹ A nomination is required for the candidate's name to appear on the ballot for an election. A candidate seeking nomination, whether through a recognized political party, as an "independent"/unaffiliated candidate, or for nonpartisan office, must submit, with their nomination paper, a minimum number of nomination petition signatures from qualified electors.²

New Party Recognition

A recognized political party is entitled to representation on a partisan primary election ballot and subsequent placement of the prevailing candidate on the general election ballot as the party's nominee. A political party may obtain first-time or new-party recognition by submitting a sufficient number of valid petition signatures to the appropriate filing officer.³

Initiative

Arizona voters may propose new laws, amend existing laws, or propose constitutional amendments through the initiative process.⁴ Before signatures may be collected, an Application for Serial Number, along with a two-hundred-word description and the complete title and text of the measure, must be filed with the Secretary of State on a prescribed form.⁵ An initiative petition must be filed four months prior to the date of the general election at which the proponents seeks to put the measure on the ballot to be decided on by the voters.⁶

Referendum

Any measure or part of any measure enacted by the Legislature, except laws immediately necessary for the preservation of the public peace, health, or safety, or for the support and maintenance of the departments of State government, may be

¹ [A.R.S. §§ 16-311; 16-312.](#)

² [A.R.S. §§ 16-321; 16-322; 16-341.](#)

³ [A.R.S. §§ 16-801; 16-802.](#)

⁴ [Ariz. Const. art. IV, pt. 1, § 1.](#)

⁵ [A.R.S. § 19-111\(A\).](#)

⁶ [Ariz. Const. art. IV, pt. 1, § 1\(4\).](#)

sent to the ballot for approval or rejection by the people.⁷ An Application for Serial Number, along with a two hundred-word description and a copy of the measure, must be filed with and approved by the Secretary of State before the circulation of the petition.⁸ A referendum petition must be filed within 90 days of when the Legislature adjourns *sine die*.⁹

Recall

Any public officer¹⁰ in the State of Arizona holding an elective office, either by election or appointment, is subject to recall by the voters of the electoral district in which the public officer holds office.¹¹ A member of the Legislature may be recalled at any time after five days from the beginning of the first legislative session after their election. All other officers may be recalled after six months in office.¹² An Application for Serial Number, along with a two-hundred word statement on the grounds of the recall, must be filed with the Secretary of State before circulation of the recall petition.¹³

B. Key Circulator Definitions

Circulators collect signatures of qualified electors to support one of the petitions outlined in the preceding section. A circulator may be paid or a volunteer.

- A **paid circulator** is a person who receives compensation for obtaining signatures on a statewide initiative, referendum, or recall petition.¹⁴ A paid circulator does not include a paid employee of a political committee unless that employee's primary responsibility is circulating petitions and the employee has or will obtain 200 or more signatures on an initiative, referendum, or recall petition in an election cycle.¹⁵
- A **volunteer circulator** is a person who does not receive compensation for circulating petitions.

The circulator should check the requirements for each petition type they are circulating to confirm the circulator is in compliance. For example, paid circulators for initiative, referendum, or recall petitions must register with the appropriate filing officer prior to circulating.

Regardless of paid status, all circulators for initiative, referendum, or recall petitions and must indicate their paid or volunteer status¹⁶ on the face of all petition sheets prior to circulation.¹⁷ If the paid or volunteer status is not correctly indicated, the signatures obtained on that particular sheet are considered void.¹⁸

Any person who is qualified to register to vote in Arizona may circulate petitions.¹⁹ With respect to **nonresident circulators**, this means a circulator must be qualified to register to vote in Arizona had they been a resident in this State.²⁰ Nonresident circulators for any petition type must register prior to circulating.

However, a person may not register to circulate a statewide initiative, referendum, or recall petition if they:²¹

⁷ [Ariz. Const. art. IV, pt. 1, § 1\(3\)](#).

⁸ [A.R.S. § 19-111\(A\)](#).

⁹ [Ariz. Const. art. IV, pt. 1, § 1\(3\)-\(4\)](#).

¹⁰ Although the Arizona Secretary of State will accept a recall petition application for the recall of a United States senator or representative, the validity of the recall is subject to court challenge.

¹¹ [Ariz. Const. art. VIII, pt. 1, § 1](#); [A.R.S. § 19-201\(A\)](#).

¹² [A.R.S. § 19-202\(A\)](#).

¹³ [A.R.S. § 19-203](#).

¹⁴ [A.R.S. §§ 19-118\(T\)\(1\); 19-205.01\(H\)\(1\)](#).

¹⁵ [A.R.S. §§ 19-118\(T\)\(2\); 19-205.01\(H\)\(2\)](#).

¹⁶ The "paid" or "volunteer" status boxes may be pre-marked by the circulator or the committee or petition circulating organization on behalf of the circulator.

¹⁷ [A.R.S. §§ 19-101\(C\)-\(D\); 19-102\(C\)-\(D\); 19-204\(C\)-\(D\)](#).

¹⁸ [A.R.S. §§ 19-101\(E\); 19-102\(E\); 19-204\(E\)](#).

¹⁹ [A.R.S. §§ 19-112\(D\); 19-204\(D\)](#).

²⁰ [A.R.S. § 19-112\(D\)](#).

²¹ [A.R.S. §§ 19-118\(D\); 19-205.01\(D\)](#).

- have had a civil or criminal penalty imposed for a violation of statutes relating to elections or initiatives, referendums, and recalls (A.R.S. Titles 16 or 19) within the immediately preceding five years;
- have been convicted of treason or a felony and their civil rights have not been restored; or
- have been convicted of any criminal offense involving fraud, forgery, or identity theft.

Further, no County Recorder or Justice of the Peace may circulate initiative, referendum, or recall petitions in Arizona.²²

²² [A.R.S. §§ 19-114\(A\); 19-205.02.](#)

II. Circulator Registration Process

All non-resident circulators of candidate petitions (at any jurisdictional level),²³ as well as non-resident and/or paid circulators of recall (at any jurisdiction level), and statewide initiative or referendum²⁴ petitions must register through the Secretary of State’s online [Circulator Portal](#).²⁵

The following chart provides a quick reference for when a circulator needs to register:

Petition Type	Circulator is paid	Circulator is not AZ resident (regardless of paid status)
Candidate	No	Yes
Statewide Initiative/Referendum	Yes	Yes
Recall	Yes	Yes
New Party	No	No

A. Creating an Account

1. If you are a first-time circulator, click “Sign Up” to begin the process.

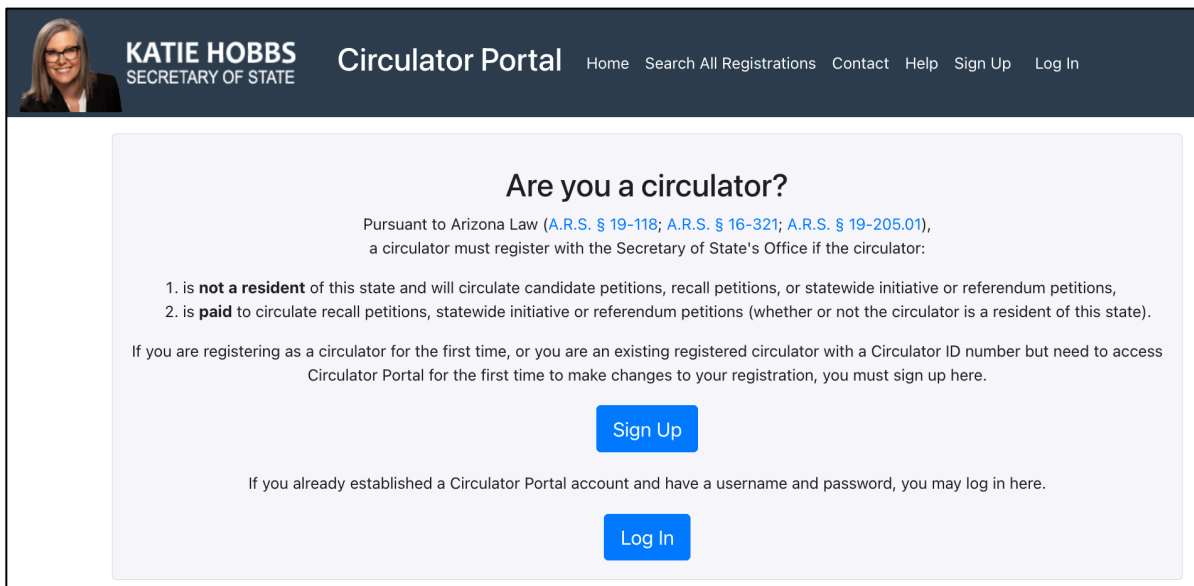


FIGURE 1: CIRCULATOR PORTAL HOMEPAGE

2. This page confirms that you have not previously received a Circulator ID number. If you have previously registered, click “No, I was not issued a Circulator ID number.”

²³ [A.R.S. § 16-315\(D\)](#).

²⁴ [A.R.S. §§ 19-118\(A\); 19-205.01\(A\)](#).

²⁵ [A.R.S. § 19-118\(A\)](#).

Do you already have a Circulator ID number?

If you previously registered as a circulator with the Secretary of State's Office and received a Circulator ID number, please enter it below along with your last and first name.

If you don't remember your ID number, please do not sign up for a new Circulator ID number but contact us at 602-542-8683 or 1-877-THE-VOTE.

Circulator ID Number
Required

Last Name
Required

First Name
Required

Continue signing up with your Circulator ID number

No, I was not issued a Circulator ID number

FIGURE 2: CIRCULATOR PORTAL SIGN UP PAGE 1

3. Provide the circulator's full legal name.²⁶ For the address section, the circulator must select if their permanent address is outside of Arizona. If "yes" is selected, the circulator will need to include the permanent residential address outside of Arizona and the temporary residential address in Arizona. If "no" is selected, only the permanent residential address will be requested.

The address provided in Arizona is where the circulator will accept service of process related to disputes concerning circulation of that circulator's petitions (for circulators of statewide initiative and referendum petitions, this address must be the address of the committee in Arizona for which the circulator is gathering signatures).²⁷

Continue to input the contact information²⁸ and create a password. Once the information is properly entered, click "Sign Up."²⁹

²⁶ [A.R.S. §§ 19-118\(B\)\(1\); 19-205.01\(B\)\(1\).](#)

²⁷ [A.R.S. §§ 19-118\(B\)\(4\); 19-205.01\(B\)\(4\).](#)

²⁸ [A.R.S. §§ 19-118\(B\)\(1\); 19-205.01\(B\)\(1\).](#)

²⁹ The Secretary of State's Office has no obligation to review circulator registrations to ensure a proper Arizona and/or committee address has been provided. The circulator remains solely responsible for compliance with all legal provisions.

Sign Up

If you are registering as a circulator for the first time, or you are an existing registered circulator with a Circulator ID number but need to access Circulator Portal for the first time to make changes to your registration, you must sign up here.

Pursuant to Arizona Law (A.R.S. § 19-118; A.R.S. § 16-321; A.R.S. § 19-205.01), a circulator must register with the Secretary of State's Office if the circulator:

1. is **not a resident** of this state and will circulate candidate petitions, recall petitions, or statewide initiative or referendum petitions,
2. is **paid** to circulate recall petitions, statewide initiative or referendum petitions (whether or not the circulator is a resident of this state).
3. The definition of a "paid circulator" is outlined in A.R.S. § 19-118(F). Please read the important criminal prohibition outlined in A.R.S. § 19-118.01.

Please complete the form below to create an account.

Circulator Name

First Name Last Name Suffix

Required Required Optional

Do you consider somewhere outside of Arizona to be your permanent residential address?

Select...

Permanent Residential Address

Street Address

Required

City State Zip Code

Required Required Required

Contact Information

Phone Number

Required

Email Confirm email

Required Required

Password

Password Confirm password

Required Required

Your password must be at least 6 characters long and contain one digit.

Sign Up Cancel

FIGURE 3: PORTAL SIGN UP PAGE 2

4. Upon successfully creating an account in Circulator Portal, the Secretary of State's Office will assign a random circulator ID number to each circulator via email.³⁰ An automated email from no-reply@azsos.gov will contain the circulator ID number and links to Circulator Portal. The email may go to your junk or spam folder.

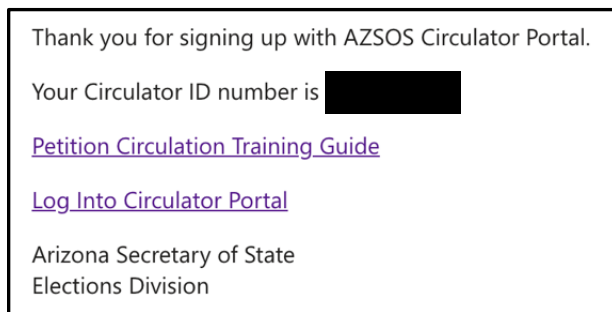


FIGURE 4: CIRCULATOR REGISTRATION CONFIRMATION EMAIL

³⁰ [A.R.S. §§ 19-118\(C\); 19-205.01\(C\).](#)

This circulator ID number is permanently assigned to the circulator, so it must be used for all petitions being circulated by that circulator, regardless of the election cycle.

If you are registering to circulate a statewide initiative/referendum petition or a recall petition of any jurisdiction level you must complete an Affidavit of Eligibility first. If you are registering to circulate a candidate petition you may proceed directly to the Petition Registration.

B. Affidavit of Eligibility

The Affidavit of Eligibility is a document that must be notarized then uploaded into the Circulator Portal before the circulator is considered properly registered for statewide initiative and referendum petitions, or recall petitions of any jurisdiction level. To begin, log into Circulator Portal, then click “Affidavit of Eligibility” on the left-hand side.

You are currently logged in as [REDACTED] Your Circulator ID is [REDACTED]

My Portal

- Affidavit of Eligibility
- All My Petitions
- Add a Petition
- Update My Account Info
- Change My Password
- Circulator Training Guide

Affidavit of Eligibility

If you are registering to circulate a recall petition that received a serial number on or after September 29, 2021, or a statewide initiative or referendum petition, you must submit a notarized Affidavit of Eligibility as part of your circulator registration. [A.R.S. § 19-118\(B\)\(5\); A.R.S. § 19-205.01\(A\)](#).

INSTRUCTIONS FOR SUBMITTING AFFIDAVIT OF ELIGIBILITY

- Please download the Affidavit of Eligibility from here and print out the form.
 - [Download form as PDF](#) Updated 9/29/2021
 - [Download form as Microsoft Word \(.DOCX\)](#) Updated 9/29/2021
- In front of a notary public, print your full name at the beginning of both paragraphs and sign the Affidavit of Eligibility. **Completing both paragraphs satisfies the affidavit requirements to circulate initiatives, referenda, and recalls.**
- The notary must sign and place their seal on the form.
- Upload an electronic copy (PDF) of the completed, notarized Affidavit of Eligibility by clicking “Upload Affidavit of Eligibility” below.
- After your Affidavit of Eligibility has been uploaded, our office will review the affidavit and email you a notification after it has been reviewed.

Circulators are not required to provide a hard copy of their registration affidavit to the Secretary of State’s Office but should maintain the original for their records in the event of a legal challenge.

IMPORTANT: If you are registering to circulate a recall petition after 9/29/2021, you must submit a new notarized Affidavit of Eligibility, even if you previously submitted one as part of your circulator registration prior to that date. You only need to complete the new affidavit once. [A.R.S. § 19-205.01\(A\)](#)

[Upload Affidavit of Eligibility](#)

FIGURE 5: AFFIDAVIT OF ELIGIBILITY TAB

Download, print, and complete the Affidavit of Eligibility. Complete the affidavit in front of a notary public. You must print your full legal name at the beginning of both paragraphs, sign, and date the form. The notary must complete the county at the top, stamp and sign the bottom, and write their expiration date. See the Appendix for an example of the Affidavit of Eligibility.

The Affidavit of Eligibility states that the circulator is eligible to register, that all information contained in the registration is true and correct, and that the circulator has read and understands Arizona election laws applicable to the collection of signatures for a statewide initiative, referendum, or recall.³¹

Once completed, upload a scan of the affidavit form in Circulator Portal. The notarized circulator affidavit must be accepted by the Secretary of State’s Office before the circulator is permitted to register to circulate a statewide initiative, referendum, or recall petition. Circulators are not required to submit a hard copy to the Secretary of State’s Office, but the original should be maintained in the event of a legal challenge.

Given a change in the law, circulators who uploaded an affidavit before September 29, 2021, must upload a new affidavit if they wish to register to circulate a recall petition.

The applicable committee and/or the circulating organization that employs petition circulators, at the direction of the applicable committee, may coordinate with their circulators to gather the necessary information, including, if applicable, notarized circulator affidavits, and facilitate submission of registration applications.

The circulator registration is complete once you receive the email stating that your Affidavit of Eligibility has been accepted by the Secretary of State’s Office.

C. Petition Registration

You must register for each individual petition you wish to circulate under the “Add a Petition” section. Until you complete this step you are not registered to circulate that petition. Any signatures collected before the date on the petition registration may be subject to rejection.

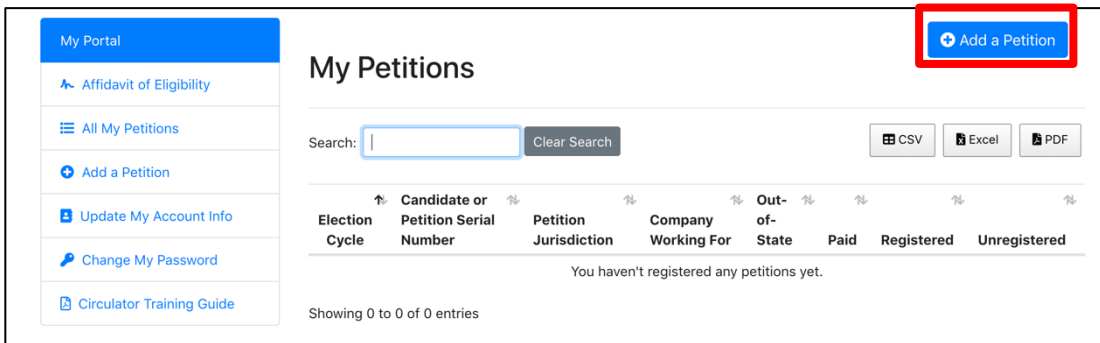


FIGURE 6: MY PETITIONS TAB

You will be asked to complete the following information for each individual petition:

- Select if you are paid and/or an out-of-state circulator from the check boxes.
- Select the jurisdiction for the petition you will be circulating from the drop down: Federal, Statewide/Legislative, County, or City/Town.
- Include a service of process address. For initiative, referendum, and recall this should be the address of the committee, organization, or individual from whom you are circulating petitions.
- If you are a paid circulator, include the name of the organization for which you are hired.
- Select the type of petition: Candidate Name or Petition Serial Number (Initiative, Referendum, or Recall)
 - If you select “Candidate Name” you will be prompted to enter the candidate’s name. Please ensure you correctly type the name the candidate has listed on their Statement of Interest and/or Nomination Petitions.

³¹ [A.R.S. §§ 19-118\(B\)\(5\); 19-205.01\(B\)\(5\).](#)

- If you select “Petition Serial Number” for in the Statewide/Legislative jurisdiction you will be offered a drop down of petition serial numbers for the current election cycle.
- If you select “Petition Serial Number” for a jurisdiction other than Statewide/Legislative, you will be prompted to type in the serial number as prescribed to the ballot measure you wish to circulate.
- Finally, carefully read and acknowledge all of the final statements by checking the adjacent box and select submit.

Once you submit the “Add a Petition” form you will be able to view a PDF of your responses in the “All My Petitions” section. You will also have the option to unregister for petitions for which you have previously registered.

III. Gathering Signatures

Every qualified elector signing a petition must do so in the presence of the person who is circulating the petition. In other words, the circulator must personally witness each collected signature.³² For initiative, referendum, and recall petitions, after collecting signatures on a petition sheet, the petition circulator must execute the affidavit of verification on the back of the petition, swearing before a notary public, that all of the following are true:

1. At the time of the signing, each name on the sheet was signed, and the name and address were printed by the elector on the date indicated;³³
2. In the circulator’s belief each signer was a qualified elector of a certain county of the state, or, in the case of a city, town, or county measure, of the city, town or county affected by the measure on the date indicated;³⁴ and
3. At all times during circulation of the signature sheet, a full copy of the title and text was attached to the signature sheet.³⁵

Although a circulator of candidate petitions and petitions for new party recognition must also personally witness each collected signature, the circulator verification on candidate and new party petitions need not be notarized.³⁶

When approaching an individual to sign a petition, the circulator **should**:

1. Read or summarize the warning that appears at the top of the petition;
2. Ensure the signer prints clearly in black or dark blue ink;
3. Ensure the signer completes all portions of the signature line (i.e., signature, printed first and last name, residence address, and date signed); and
4. Ensure the signer writes inside, and does not stray outside, of the appropriate boxes on the signature line.

Tips and best practices for circulators:

- Greet each potential signer warmly and make eye contact.
- Walk towards a potential signer to meet them halfway.
- Be prepared to summarize the description of the measure.
- Have legal sized clipboards and pens ready for multiple signers.
- Ensure signers print their address or description of address *where they are registered to vote*. If voters are unsure of

³² [A.R.S. §§ 19-112\(A\); 19-205\(A\).](#)

³³ [A.R.S. §§ 19-112\(A\); 19-205\(A\).](#)

³⁴ [A.R.S. §§ 19-112\(C\); 19-205\(B\).](#)

³⁵ [A.R.S. §§ 19-112\(C\); 19-205\(B\).](#)

³⁶ [A.R.S. §§ 16-315; 16-321\(D\); 16-801\(A\)\(2\).](#)

where they are registered to vote, encourage them to look up their information on the Secretary of State's website my.arizona.vote.

When approaching an individual to sign a petition, the circulator **should not**:

- Sign for the individual or allow any other individual to complete any portion of the signature line unless in the presence of (and at the request of) a person who is incapable of signing or printing their own name because of physical disability or medical condition;³⁷
- Allow the individual to sign the same petition twice;³⁸
- Allow a post office box to serve as the individual's residence address on an initiative, referendum, or recall petition.³⁹
- Threaten someone to sign or not sign an initiative, referendum, or recall petition.⁴⁰

A. Assisting Voters with a Disability or Medical Condition

Qualified electors who require assistance in completing and/or signing a petition due to a physical disability or medical condition shall not be prevented from signing a petition solely on that basis.

As a best practice, circulators should execute a supplemental affidavit (in addition to the circulator affidavit on the petition sheet) specifying whether assistance was provided to any voter who signed and required assistance. In addition, the person who assisted the voter may sign a declaration: (i) stating that the person assisted the voter in the voter's presence and at the voter's specific request; and (ii) providing the name and residence address of the voter who was assisted, the name and residence address of the person who assisted the voter, the title and serial number of the petition signed, and the date.

Any such supplemental affidavits and/or voter assistance declarations should be retained by the committee in the event of a challenge. Copies of all supplemental affidavits may be submitted to the Secretary of State's Office at the time of filing as a file separate from the petition pages.

B. Signature Withdrawal

A person who has signed a petition may withdraw their signature from the petition not later than 5:00 p.m. on the date the petition containing the person's signature is submitted to the Secretary of State (or, for non-statewide petitions, the appropriate filing officer).⁴¹ To withdraw a petition signature, a person may do any of the following:⁴²

1. Verify the withdrawal by signing a statement of intent to withdraw. The statement is available on the Secretary of State's website.⁴³ For non-statewide petitions, contact the appropriate filing officer to acquire the correct form or statement;
2. Mail or drop off a signed, notarized statement of intent to withdraw to the Secretary of State's Office. Or for non-statewide petitions mail or drop off with the appropriate filing officer; or

³⁷ [A.R.S. §§ 19-115\(B\); 19-205\(C\)\(1\).](#)

³⁸ [A.R.S. §§ 19-115\(B\); 19-205\(C\)\(2\).](#)

³⁹ [A.R.S. §§ 19-112\(A\); 19-205\(A\)\(2\).](#) The signer must provide their residence address, giving street name and number, and if they do not have a street address, a description of their residence.

⁴⁰ [A.R.S. §§ 19-116; 19-206\(B\).](#)

⁴¹ [A.R.S. § 19-113\(A\).](#) New Party petitions are not included in the list of petitions to withdraw a signature.

⁴² [A.R.S. § 19-113\(B\).](#)

⁴³ For initiative, referenda, or recalls: <https://azsos.gov/elections/initiative-referendum-recall>. For candidate petitions: <https://azsos.gov/elections/running-office>.

3. The filing officer will draw a line through the signer's signature line on the petition to indicate that it has been withdrawn and will not count towards the valid signature total for the petition.

IV. Signature Review Process

Once a petition is submitted, the filing officer reviews the petition to determine the number of valid signatures. The following section provides an overview of what items the filing officer reviews. A more in-depth review guide can be found in the handbook associated with each petition type. Handbooks can be found on the Secretary of State's website.⁴⁴ For local jurisdiction petitions, please consult the appropriate filing officer regarding the review process. All petitions are also subject to legal challenge.

A. Reviewing Petition Signatures

The following petition signature items are reviewed:

1. Non-Qualified Elector: If an individual who is not a qualified elector signs a petition that he/she is not legally entitled to vote upon, the petition signature will be rejected.⁴⁵
2. Circulated by County Recorder or Justice of the Peace: Any signatures gathered by a County Recorder or Justice of the Peace for an initiative, referendum, or recall petition are void and will not be counted in determining the legal sufficiency of the petition.⁴⁶
3. Initiative, Referendum, and Recall Petition Signatures Obtained Prior to Statement of Organization: Signatures obtained prior to the filing of a political committee's statement of organization are void and will not be counted in determining the legal sufficiency of the petition.⁴⁷
4. Candidate Nomination Petition Signatures Obtained Prior to the Statement of Interest: Signatures obtained prior to the filing of a candidate's statement of interest are void.⁴⁸
5. Missing Information: First and last name, signature, residence address or description of residence location (or, for candidate petitions, P.O. box with city/town or zip code), and date on which the petition was signed must all be present for a signature to be valid.⁴⁹
6. Excess Signatures: Signatures in excess of 15 signatures per initiative or referendum, or 10 signatures per candidate nomination, recall petition sheet, or new party recognition petition sheet are not counted.⁵⁰
7. Withdrawn Signatures: Signatures withdrawn pursuant to A.R.S. § 19-113 are not counted.⁵¹
8. Improperly Printed Information: Signatures for which the Secretary of State determines that the circulator has printed the elector's name or information on an initiative or referendum petition in violation of A.R.S. § 19-112 are not counted.⁵²

⁴⁴ <https://azsos.gov/elections>

⁴⁵ [A.R.S. §§ 19-115; 19-121.02\(A\)\(5\); 16-321\(B\); 19-208.02\(A\)\(5\); 16-801\(A\)\(2\).](#)

⁴⁶ [A.R.S. §§ 19-114\(A\); 19-205.02.](#)

⁴⁷ [A.R.S. § 19-114\(B\).](#) The applicant may form a new political committee or designate an existing (non-candidate) political committee to serve as the petition sponsor. [A.R.S. § 16-906\(G\).](#)

⁴⁸ [A.R.S. § 16-311\(H\).](#) Signatures collected before the filing of the Statement of Interest are subject to legal challenge.

⁴⁹ [A.R.S. §§ 19-121.01\(A\)\(3\)\(a\)-\(c\); 19-208.01\(A\); 16-315\(A\)\(4\)\(c\).](#)

⁵⁰ [A.R.S. §§ 19-121.01\(A\)\(3\)\(d\); 19-208.01\(A\)\(3\)\(d\); 16-315\(A\)\(3\).](#)

⁵¹ [A.R.S. §§ 19-121.01\(A\)\(3\)\(e\); 19-208.01\(A\).](#)

⁵² [A.R.S. §§ 19-121.01\(A\)\(3\)\(f\); 19-112\(A\); 19-208.01\(A\).](#)

B. Reviewing Petition Sheets

The Secretary of State (or, for non-statewide petitions, the appropriate filing officer) must remove:⁵³

1. Initiative petition sheets not attached to a copy of the complete text and title of the measure as submitted to the filing officer with the application for serial number.
2. Referendum petition sheets not attached to a copy of the complete date-stamped of the measure to be referred to the voters.
3. Recall petition sheets not attached to a copy of the date-stamped application for serial number.
4. Initiative, referendum, or recall petition sheets not bearing the correct petition serial number, and if applicable, the paid circulator registration number in the lower righthand corner of each side.
5. Initiative, referendum, or recall petition sheets on which the affidavit of the circulator is not notarized, the notary's signature is missing, the notary's commission has expired, or the notary's seal is not affixed; also, sheets where the circulator's affidavit is incomplete, unsigned, or has been modified from the original text.
6. Initiative, referendum, or recall petition sheets on which the notary signature is dated before all the electors signed the face of the petition sheet.
7. Initiative, referendum, or recall petition sheets that are circulated by a circulator who is prohibited from participating in any election, initiative, referendum or recall campaign pursuant to A.R.S. §§ 19-119.01; 19-205.01 or prohibited from registering as a circulator pursuant to A.R.S. §§ 19-118(D); 19-206.01.
8. Sheets on which the circulator is required to be registered with the Secretary of State pursuant to A.R.S. §§ 16-321; 19-118; 19-206.01, and the circulator was not properly registered at the time the petition sheet was circulated.

C. Prohibited Acts

The following acts may be punishable by fine or imprisonment under Arizona law:⁵⁴

1. Signing Petition for Profit: Any person who knowingly gives or receives money or any other thing of value for signing an initiative, referendum, or recall petition, excluding payments made to a person for circulating such petition, is guilty of a class 1 misdemeanor.⁵⁵
2. Signing for Another: A person who knowingly signs any name other than their own to a candidate nomination, initiative, referendum, or recall petition, except in a circumstance where they sign for a person in the presence of (and at the specific request of) such a person who is incapable of signing or printing their own name and address because of a physical disability or medical condition, is guilty of a class 1 misdemeanor.⁵⁶
3. Signing More than Once: A person who knowingly signs their name more than once for the same initiative or referendum petition is guilty of a class 1 misdemeanor.⁵⁷

⁵³ [A.R.S. § 19-121.01\(A\); 19-208.01\(A\)\(1\).](#)

⁵⁴ [A.R.S. § 19-118.01.](#)

⁵⁵ [A.R.S. §§ 19-114.01; 19-205.03.](#)

⁵⁶ [A.R.S. §§ 19-115\(B\); 19-206\(B\); 16-1020.](#)

⁵⁷ [A.R.S. §§ 19-115\(B\); 16-1020.](#)

4. **Fraudulent Signing:** A person who is not a qualified elector at the time of signing, or who knowingly fills out the name and address portion of the petition with the intent to commit fraud, is guilty of a class 1 misdemeanor.⁵⁸
5. **Coercion:** A person who knowingly coerces or threatens any other person to sign or refrain from signing their name to an initiative, referendum, or recall petition, or, after signing their name, to have their name removed, is guilty of a class 1 misdemeanor.⁵⁹
6. **Misrepresentation:** A circulator who induces a person to sign an initiative, referendum, or recall petition by knowingly misrepresenting the general subject matter of the measure is guilty of a class 1 misdemeanor.⁶⁰
7. **Fraud:** A person commits petition signature fraud if the person intentionally collects petition signature sheets with the knowledge that the person whose name appears on the signature sheet did not actually sign the petition, or uses any fraudulent means to obtain signatures on a petition.⁶¹ A person under such circumstances is guilty of a class 1 misdemeanor, but may be guilty of a class 4 felony and prohibited from participating for five years in any election, initiative, referendum, or recall campaign if the person engages in a pattern of petition signature fraud.⁶²
8. **Deceptive Mailings:** An individual or committee may not deliver any document that falsely purports to be a mailing authorized, approved, required, or sent by the government, or that falsely simulates a document from the government.⁶³ A violation of this provision may result in civil penalty equal to twice the total of the cost of the mailing or five hundred dollars, whichever is greater.⁶⁴

⁵⁸ [A.R.S. § 19-115\(B\)](#).

⁵⁹ [A.R.S. §§ 19-116\(A\); 19-206\(A\)](#).

⁶⁰ [A.R.S. §§ 19-116\(B\); 19-206\(B\)](#).

⁶¹ [A.R.S. § 19-119.01\(A\)](#).

⁶² [A.R.S. § 19-119.01\(C\)](#).

⁶³ [A.R.S. § 19-119\(A\)](#).

⁶⁴ [A.R.S. § 19-119\(B\)](#).

V. Frequently Asked Questions

What if a signer makes a mistake while adding their information to a petition sheet?

- ⇒ If a signer makes a mistake, they may cross out the mistake and correct the error as legibly as possible, or cross out the line in which they started to sign, invalidating their first attempt, and sign again.

Can a signer use their mailing address to sign an initiative or referendum petition sheet?

- ⇒ No, a signer must print their residential address or description of residence when signing a ballot measure petition sheet.

A petition sheet has been damaged or ripped, can I repair it?

- ⇒ Yes, please only use tape to repair and flatten any damage. Additional foreign objects such as staples or paperclips will damage our scanners and therefore have to be removed before scanning.

May I correct an error in my circulator statement or notary statement prior to submitting?

- ⇒ Possibly. Please keep in mind that if your affidavit has already been notarized, you may not be able to make changes to the document. However, for all other edits, a circulator or notary may correct an error by crossing out the incorrect information and writing the corrected information clearly. Our office will not reject your forms for edits, but they may be challenged in court.

I have forgotten my password or need my email changed.

- ⇒ Email circulator@azsos.gov with your full name, circulator ID number, phone number and the request. You will receive a call back from our office to confirm prior to our office resetting the password.

I have circulated in Arizona before, how do I find my circulator ID number?

- ⇒ Using the “Search All Registrations” tool on Circulator Portal, you should be able to find your circulator ID number. For further assistance please contact circulator@azsos.gov.

Who do I contact if I have further questions?

- ⇒ For any questions related to Circulator Portal or obtaining a circulator ID number, please contact circulator@azsos.gov.

APPENDIX

FOR OFFICE USE ONLY

STATE OF ARIZONA



AFFIDAVIT OF REGISTERED CIRCULATOR FOR INITIATIVE/REFERENDUM/RECALL PETITION (A.R.S. § 19-118(B)(5)) (A.R.S. § 19-205.01(B)(5))

State of Arizona)
County of _____) ss:

I, _____, UNDER PENALTY OF A CLASS 1 MISDEMEANOR, ACKNOWLEDGE THAT I AM ELIGIBLE TO REGISTER AS A CIRCULATOR IN THE STATE OF ARIZONA, THAT ALL OF THE INFORMATION PROVIDED IS CORRECT TO THE BEST OF MY KNOWLEDGE AND THAT I HAVE READ AND UNDERSTAND ARIZONA ELECTION LAWS APPLICABLE TO THE COLLECTION OF SIGNATURES FOR A STATEWIDE INITIATIVE OR REFERENDUM .

I, _____, UNDER PENALTY OF A CLASS 1 MISDEMEANOR, ACKNOWLEDGE THAT I AM ELIGIBLE TO REGISTER AS A CIRCULATOR IN THE STATE OF ARIZONA, THAT ALL OF THE INFORMATION PROVIDED IS CORRECT TO THE BEST OF MY KNOWLEDGE AND THAT I HAVE READ AND UNDERSTAND ARIZONA ELECTION LAWS APPLICABLE TO THE COLLECTION OF SIGNATURES FOR A RECALL.

Signature of affiant

SUBSCRIBED AND SWORN to (or affirmed) before me this _____ day of _____, 20____.

Notary Public

(Seal)

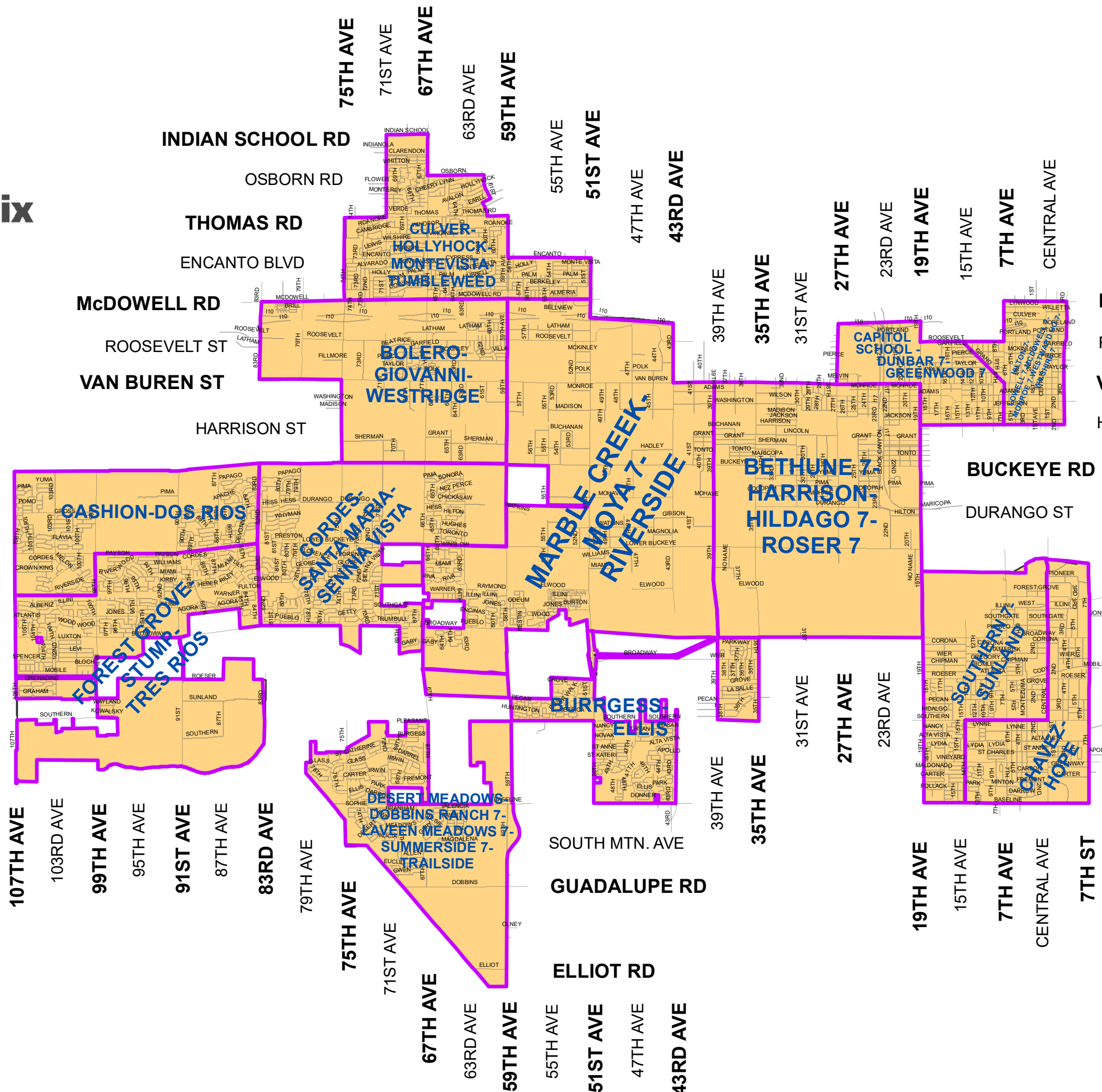
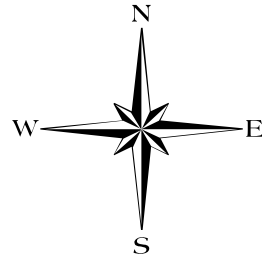
My Commission Expires: _____

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City of Phoenix

Council District 7



McDOWELL RD
 ROOSEVELT ST
 VAN BUREN ST
 HARRISON ST

BUCKEYE RD
 DURANGO ST
 LWR. BUCKEYE RD
 ELWOOD ST
 BROADWAY RD
 ROESER RD
 SOUTHERN AVE
 VINEYARD DR
 BASELINE RD

BUCKEYE RD
 DURANGO ST
 UNIVERSITY DR
 ELWOOD ST
 BROADWAY RD
 ROESER RD
 SOUTHERN AVE
 VINEYARD DR
 BASELINE RD