

Instructions

All candidates must complete Boxes A and B. Candidates who receive contributions or incur expenses must complete Boxes C, D, Schedule 1 and Schedule 2 as appropriate. Candidates who receive contributions or incur expenses in excess of \$10,000 must also attach an Auditor's Report.

All surplus funds (after any refund to the candidate or their spouse) shall be immediately paid to the clerk who is responsible for the conduct of the election.

For the campaign period from (day clerk received nomination)

YYYY	MM	DD
2022	08	11

 to

YYYY	MM	DD
2022	12	31

☒ Initial filing reflecting finances from start of campaign to December 31 (or 45 days after voting day in a by-election)

☐ Supplementary filing reflecting finances from start of campaign to end of extended campaign period

Box A: Name of Candidate and Office

Candidate's name as shown on the ballot

Last Name or Single Name BURGESS Given Name(s) JULIA

Office for Which the Candidate Sought Election G.E.C.D.S.B. MEMBER (TRUSTEE) Ward Name or Number (if any)

Municipality TOWN OF KINGSVILLE, TOWN OF ESSEX

Spending Limit General <u>27,576.00</u> \$ <u>24,855.14</u>	Parties and Other Expressions of Appreciation \$ <u>2485.52 2757.60</u>	Contribution Limit Contributions from Candidate and Spouse \$ <u>9671.80 10,312.00</u>
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☐ I did not accept any contributions or incur any expenses. (Complete Boxes A and B only)

Box B: Declaration

I, JULIA BURGESS, declare that to the best of my knowledge and belief that these financial statements and attached supporting schedules are true and correct.


Signature of Candidate

2023/03/30
Date (yyyy/mm/dd)

Date Filed (yyyy/mm/dd)	Time Filed	Initial of Candidate or Agent (if filed in person)	Signature of Clerk or Designate
<u>2023/03/31</u>	<u>10:52 am.</u>	<u>JB</u>	<u></u>

Box C: Statement of Campaign Income and Expenses

LOAN

Name of bank or recognized lending institution

Amount borrowed \$

INCOME

1.	Total amount of all contributions (from line 1A in Schedule 1)	\$ 1753.52
2.	Revenue from items \$25 or less	
3.	Revenue from fundraising events not deemed a contribution	
4.	Sign deposit refund	
5.	Revenue from Part III of Schedule 2	
6.	Interest earned by campaign bank account	
7.	Other (provide full details)	
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Total Campaign Income (Do not include loan) = \$ 1893.65 c1

EXPENSES (Note: Include the value of contributions of goods and services)

1.	Inventory from previous campaign used in this campaign (list details in Table 2 of Schedule 1)	\$ 200.00
2.	Advertising	\$ 739.02
3.	Brochures/flyers	\$ 647.85
4.	Signs (including sign deposit)	\$ 597.95
5.	Meetings hosted	
6.	Office expenses incurred until voting day	
7.	Phone and/or internet expenses incurred until voting day	
8.	Salaries, benefits, honoraria, professional fees incurred until voting day	\$ 88.37
9.	Bank charges incurred until voting day	
10.	Interest charged on loan until voting day	
11.	Other (provide full details)	
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Total Expenses subject to general spending limit = \$ 2273.19 c2

2. Expenses subject to spending limit for parties and other expressions of appreciation

1. ROYAL CANADIAN LEAGION POSTELECTION THANKS + \$ 68.77

2.		+ \$	
3.		+ \$	
4.		+ \$	
5.		+ \$	
Total Expenses subject to spending limit for parties and other expressions of appreciation		= \$	<u>68.77</u> C3

3. Expenses not subject to spending limits

Accounting and audit	+ \$	
Cost of fundraising events/activities (list details in Part IV of Schedule 2)	+ \$	
Office expenses incurred after voting day	+ \$	
Phone and/or internet expenses incurred after voting day	+ \$	
Salaries, benefits, honoraria, professional fees incurred after voting day	+ \$	
Bank charges incurred after voting day	+ \$	
Interest charged on loan after voting day	+ \$	
Expenses related to recount	+ \$	
Expenses related to controverted election	+ \$	
Expenses related to compliance audit	+ \$	
Expenses related to candidate's disability (provide full details)		
1.	+ \$	
2.	+ \$	
3.	+ \$	
4.	+ \$	
5.	+ \$	
Other (provide full details)		
1.	+ \$	
2.	+ \$	
3.	+ \$	
4.	+ \$	
5.	+ \$	
Total Expenses not subject to spending limits	= \$	<u> </u> C4

Total Campaign Expenses (C2 + C3 + C4) = \$ 2836.96 C5

Box D: Calculation of Surplus or Deficit

Excess (deficiency) of income over expenses (Income minus Total Expenses) (C1 – C5)	+ \$	<u>(443.31)</u> D1
If there is a surplus, deduct any refund of candidate's or spouse's contributions to the campaign	- \$	
Surplus (or deficit) for the campaign		= \$ <u>(443.31)</u> D2

If line D2 shows a surplus, the amount must be paid in trust, at the time the financial statements are filed, to the municipal clerk who is responsible for the conduct of the election.

☐ Additional information is listed on separate supplementary attachment, if completed manually.

Description	Date Acquired (yyyy/mm/dd)	Supplier	Quantity	Current Market Value (\$)
Election signs	2000/10/?	UNION PRINT SHOP ON WYANDOTTE ST., E NO LONGER IN BUSINESS	at	\$200.00
Total				200.00

Table 2: Inventory of campaign goods and materials from previous municipal campaign used in this campaign (Note: Value must be recorded as a contribution from the candidate and as an expense.)

☐ Additional information is listed on separate supplementary attachment, if completed manually.

Description of Goods or Services		Date Received (yyyy/mm/dd)	Value (\$)
gas for campaign vehicles		2022/09/30	101.25
gas for			2.50
attempts			11.40
Total			115.15

Part II – Contributions from candidate or spouse

Table 1: Contributions in goods or services

Total Amount of Contributions (record under Income in Box c)

Contributions paid or payable to the clerk, including contributions from anonymous sources exceeding \$25

Less: Ineligible contributions paid or payable to the contributor

(do not include contributions from candidate or spouse).

- Include ticket revenue, contributions in money, goods and services where the total contribution from a contributor exceeds \$100

(from line 1B; list details in Table 3 and Table 4)

Total value of contributions exceeding \$100 per contributor

(do not include contributions from candidate or spouse).

- Include ticket revenue, contributions in money, goods and services where the total contribution from a contributor is \$100 or less

Total value of contributions not exceeding \$100 per contributor

(include value listed in Table 1 and Table 2)

Contributions in goods and services from candidate and spouse

Contributions in money from candidate and spouse

Part I – Summary of Contributions

Schedule 1 – Contributions

\$1753.521A

\$ -

\$ -

\$ 300.00

\$ +

\$ + 315.15

1138.37 \$ +

Table 3: Monetary contributions from individuals other than candidate or spouse

Name	Full Address	Date Received (yyyy/mm/dd)	Amount Received (\$)	Amount Returned to Contributor or Paid to Clerk (\$)
AMALIA MAURIZIO	9099 RIVERSIDE DR E, WINDSOR ON	2022/09/21	\$ 300.00	0
Total			\$ 300.00	

☐ Additional information is listed on separate supplementary attachment, if completed manually.

Table 4: Contributions in goods or services from individuals other than candidate or spouse

(Note: Must also be recorded as Expenses in Box C.)

Name	Full Address	Description of Goods or Services	Date Received (yyyy/mm/dd)	Value (\$)
Total				/

☐ Additional information is listed on separate supplementary attachment, if completed manually.

Total for Part III – Contributions exceeding \$100 per contributor

(Add totals from Table 3 and Table 4 and record the total in Part 1 – Summary of Contributions)

\$ 300.00 1B

Fundraising Event/Activity 1	
Description of fundraising event/activity	Date of event/activity (yyyy/mm/dd)
Part I – Ticket revenue Admission charge (per person) (if there are a range of ticket prices, attach complete breakdown of all ticket sales) 2A \$ _____ Number of tickets sold 2B _____ Total Part I (2A X 2B) (include in Part I of Schedule 1) _____	
Part II – Other revenue deemed a contribution Provide details (e.g., revenue from goods sold in excess of fair market value)	
1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 1. + \$ _____ 2. + \$ _____ 3. + \$ _____ 4. + \$ _____ 5. + \$ _____ Total Part II (include in Part I of Schedule 1) _____ = \$ _____	
Part III – Other revenue not deemed a contribution Provide details (e.g., contribution of \$25 or less; goods or services sold for \$25 or less)	
1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 1. + \$ _____ 2. + \$ _____ 3. + \$ _____ 4. + \$ _____ 5. + \$ _____ Total Part III (include under Income in Box C) _____ = \$ _____	
Part IV – Expenses related to fundraising event or activity Provide details	
1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 1. + \$ _____ 2. + \$ _____ 3. + \$ _____ 4. + \$ _____ 5. + \$ _____ Total Part IV Expenses (include under Expenses in Box C) _____ = \$ _____	

☐ Additional schedule(s) attached, if completed manually.

Complete a separate schedule for each event or activity held.

Schedule 2 – Fundraising Events and Activities

Auditor's Report – *Municipal Elections Act, 1996* (Section 88.25)

A candidate who has received contributions or incurred expenses in excess of \$10,000 must attach an auditor's report.

Professional Designation of Auditor

Municipality	Date (yyyy/mm/dd)
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Contact Information

Last Name or Single Name	Given Name(s)	Licence Number
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Address		
Suite/Unit Number	Street Number	Street Name

Municipality	Province	Postal Code
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Telephone Number	Email Address
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The report must be done in accordance with generally accepted auditing standards and must:

- set out the scope of the examination
- provide an opinion as to the completeness and accuracy of the financial statement and whether it is free of material misstatement

☐ Report is attached

Personal information, if any, collected on this form is obtained under the authority of sections 88.25 and 95 of the *Municipal Elections Act, 1996*. Under section 88 of the *Municipal Elections Act, 1996* (and despite anything in the *Municipal Freedom of Information and Protection of Privacy Act*) documents and materials filed with or prepared by the clerk or any other election official under the *Municipal Elections Act, 1996* are public records and, until their destruction, may be inspected by any person at the clerk's office at a time when the office is open. Campaign financial statements shall also be made available by the clerk in an electronic format free of charge upon request.

