

TEXAS ETHICS COMMISSION

SPECIFIC-PURPOSE COMMITTEE CAMPAIGN FINANCE REPORT

FORM SPAC – INSTRUCTION GUIDE



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FORM SPAC – INSTRUCTION GUIDE

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These instructions are for the SPECIFIC-PURPOSE COMMITTEE CAMPAIGN FINANCE REPORT (Form SPAC). Form SPAC includes a two-sided cover sheet and Schedules A, B, C, D, E, F, H, I, J, K, T, and Form PAC-DR. All filers must submit the cover sheet, but only the schedules on which there is information to report need to be included.

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GENERAL INSTRUCTIONS

These general instructions apply to all forms required to be filed under title 15, Texas Election Code.

ELECTRONIC FILING

All persons filing campaign finance reports with the Texas Ethics Commission are required to file those reports electronically unless the person is eligible to claim an exemption. Please check the Ethics Commission's website at <http://www.ethics.state.tx.us> for more detailed information about electronic filing.

FILLING OUT THE FORMS

All reports filed on paper must be either handwritten in ink or typewritten. If you complete the report by hand, please print everything other than your signature.

If you are filing with the Ethics Commission, you may use your own computer-generated form if it provides for disclosure of all the information required on the commission's form and it is *substantially identical* in paper size, color, layout, and format. A substitute form that is substantially identical to the commission's prescribed form may be submitted for pre-approval by the commission's executive director.

Always file the cover sheets of the Campaign Finance Report form. You need to file only those schedules on which you have information to report.

You must keep an exact copy of each report filed and all records necessary to complete the report for at least two (2) years after the deadline for filing the report.

If you have questions, please call our office at (512) 463-5800 or toll-free at (800) 325-8506.

ETHICS COMMISSION GUIDES

The Ethics Commission publishes a campaign finance guide for each type of filer. These guides are designed to explain your responsibilities as a filer. The commission encourages you to read the appropriate guide *before* you begin accepting political contributions or making or authorizing political expenditures.

PHOTOCOPIES OF FORMS

You may use photocopies of Ethics Commission forms. For example, if the space provided on Schedule A is insufficient, you may make copies of a blank Schedule A form and attach more pages as needed.

FILING DATE

A document is considered timely filed if it is properly addressed with postage or handling charges prepaid and bears a postmark or receipt mark of a common or contract carrier indicating a time on or before the deadline.

If you are filing with the Ethics Commission, please address your reports and correspondence to the Texas Ethics Commission, P.O. Box 12070, Austin, Texas 78711-2070. For hand-deliveries, the commission's street address is 201 E. 14th Street, Sam Houston Building, 10th Floor, Austin, Texas 78701.

The deadline for filing a report is 5 p.m. on the due date. If the due date for a report falls on a Saturday, Sunday, or legal holiday, the report is due by 5 p.m. on the next regular business day.

SPECIFIC-PURPOSE COMMITTEE CAMPAIGN FINANCE REPORT

These instructions are for specific-purpose committee campaign treasurers using the SPECIFIC-PURPOSE COMMITTEE CAMPAIGN FINANCE REPORT (Form SPAC). A complete report includes the two-sided Form SPAC Cover Sheet, and any of the following schedules on which there is information to report: A, B, C, D, E, F, H, I, J, K, and T. (You are not required to file Schedule G.)

Note: Specific-purpose committees for supporting or opposing judicial candidates or officeholders use Form JSPAC, not Form SPAC.

GENERAL INFORMATION

Use Form SPAC to file a campaign finance report if you are:

- (1) a campaign treasurer for a specific-purpose committee;
- (2) an individual required to report direct campaign expenditures in excess of \$100; or
- (3) a former candidate or officeholder who contributes surplus political funds to a candidate or political committee.

Use Form SPAC for filing the following reports:

- Semiannual reports (January 15 and July 15)
- Pre-election reports (30th day before election, 8th day before election)
- Runoff report (8th day before runoff election)
- 10th day after campaign treasurer termination
- Dissolution report

See the instructions for Sections 9 and 10 of the Cover Sheet for help in deciding which reports you should file.

DUTIES OF CAMPAIGN TREASURER

The committee's campaign treasurer is responsible for filing this form and keeping all necessary records. Failing to file a report on time or filing an incomplete report may subject the treasurer to criminal or civil penalties.

WHERE TO FILE

The campaign treasurer of the specific-purpose committee must file this form with the same authority with which the committee filed the campaign treasurer appointment (Form STA).

FILING A DISSOLUTION REPORT

The campaign treasurer of a specific-purpose committee may file a dissolution report if the committee does not expect to accept any more political contributions or make any more political expenditures. Filing a dissolution report terminates the committee's campaign treasurer appointment and relieves the campaign treasurer of the obligation of filing any additional reports.

To dissolve the specific-purpose committee, the campaign treasurer must complete the SPECIFIC-PURPOSE COMMITTEE CAMPAIGN FINANCE REPORT (Form SPAC), check the “Dissolution” box in Section 9 of the Cover Sheet, and complete and attach the POLITICAL COMMITTEE AFFIDAVIT OF DISSOLUTION (Form PAC-DR).

For more information, see the CAMPAIGN FINANCE GUIDE FOR POLITICAL COMMITTEES.

COMPLETING THE COVER SHEET

Each numbered item in these instructions corresponds to the same numbered item on the form.

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- 1. ACCOUNT #:** If the committee is filing with the Ethics Commission, it was assigned a filer account number when the initial campaign treasurer appointment was filed. The campaign treasurer should have received a letter acknowledging receipt of the form and informing the treasurer of the committee's account number. Enter this number wherever you see “ACCOUNT #.” If the committee does not file with the Ethics Commission, you are not required to enter an account number.
- 2. TOTAL PAGES FILED:** After you have completed the form, count the total number of pages of this form and any attached schedules. Enter that number where indicated on the top line of Page 1 only. Each side of a two-sided form counts as one page.
- 3. COMMITTEE NAME:** Enter the committee's full name. Your entry here should be the same as on the committee's campaign treasurer appointment.
- 4. COMMITTEE ADDRESS:** Enter the committee's complete mailing address.
- 5. CAMPAIGN TREASURER NAME:** Enter the full name of the committee's campaign treasurer.
- 6. CAMPAIGN TREASURER'S STREET ADDRESS:** Enter the complete business or residential street address of the committee's campaign treasurer. Please do not enter a P.O. Box.
- 7. CAMPAIGN TREASURER'S MAILING ADDRESS:** Enter the complete mailing address of the committee's campaign treasurer. If the mailing address has changed since the committee last gave notice of the address, check the “Address Change” box.

8. CAMPAIGN TREASURER PHONE: Enter the phone number of the campaign treasurer, including the area code and, if applicable, the extension.

9. REPORT TYPE: Check the box that describes the type of report you are filing, according to the descriptions below. See the instructions for Section 10 for the periods covered by each type of report.

January 15 Report: All specific-purpose committees must file a semiannual report by January 15.

July 15 Report: All specific-purpose committees must file a semiannual report by July 15.

30th Day Before Election Report: Specific-purpose committees that are supporting or opposing an opposed candidate or a measure in an election and that are not filing under the modified reporting schedule file this pre-election report. The report is due no later than 30 days before the election.

8th Day Before Election Report: Specific-purpose committees that are supporting or opposing an opposed candidate or a measure in an election and that are not filing under the modified reporting schedule file this pre-election report. If a committee files a “30th Day Before Election” report, then it must file the “8th Day Before Election” report. The report is due no later than 8 days before the election.

Runoff Report: Specific-purpose committees that are supporting or opposing a candidate in a runoff election and that are not filing under the modified reporting schedule must file this report, which is due no later than 8 days before the runoff election.

Exceeded \$500 Limit Report: Specific-purpose committees that chose to file under the modified reporting schedule and then, after the 30th day before the election, exceeded \$500 in contributions or expenditures in connection with the election must file this report within 48 hours after exceeding the \$500 limit.

Dissolution Report: Specific-purpose committees file this report when no further reportable activity is expected. This report must include a completed POLITICAL COMMITTEE AFFIDAVIT OF DISSOLUTION (Form PAC-DR). There is not a fixed deadline for filing this report.

10th Day After Campaign Treasurer Termination Report: A specific-purpose committee campaign treasurer must file this report if his or her campaign treasurer appointment is terminated. This report is due no later than the 10th day after the termination is filed. If the termination takes place on the last day of a reporting period, no separate termination report is required.

10. PERIOD COVERED: A reporting period includes the beginning date and the ending date. The *due date* for filing will be *after* the end of the period. Generally, a report picks up where the last report left off. Special pre-election reports (formerly known as telegram reports) and special session reports do create overlaps.

January 15 (Semiannual) Report: The beginning date is July 1 of the previous year or the day after the last day covered by the last required report, whichever is later. If this is the committee's first report, the beginning date will be the date the initial campaign treasurer appointment was filed. The ending date is December 31 of the previous year.

July 15 (Semiannual) Report: The beginning date is January 1 or the day after the last day covered by the last required report, whichever is later. If this is the committee's first report, the beginning date will be the date the initial campaign treasurer appointment was filed. The ending date is June 30.

30th Day Before Election Report: The beginning date is the day after the last day covered by the last required report. If this is the committee's first report, the beginning date will be the date the initial campaign treasurer appointment was filed. The ending date is the 40th day before the election. (This report is not required for specific-purpose committees that are supporting or opposing unopposed candidates in the election or that are filing under the modified reporting schedule.)

8th Day Before Election Report: The beginning date is the 39th day before the election if you filed a 30th Day Before Election Report. Otherwise, the beginning date is the day after the last day covered by the last required report. If this is the committee's first report, the beginning date will be the date the initial campaign treasurer appointment was filed. The ending date is the 10th day before the election. (This report is not required for specific-purpose committees that are supporting or opposing unopposed candidates in the election or that are filing under the modified reporting schedule.)

Runoff Report: A specific-purpose committee that is supporting or opposing a candidate in a runoff and that is not filing under the modified reporting schedule must file a report that is due 8 days before the runoff election. The beginning date is the 9th day before the main election if you filed an 8th Day Before Election Report. Otherwise, the beginning date is the day after the last day covered by the last required report. If this is the committee's first report, the beginning date will be the date the initial campaign treasurer appointment was filed. The ending date is the 10th day before the runoff election.

Exceeded \$500 Limit Report: The beginning date for the report is either the day the initial campaign treasurer appointment was filed or the day after the last day covered by your last required report, whichever is later. The ending date is the day the committee exceeded the \$500 limit for contributions or expenditures.

Dissolution Report: The beginning date is the day after the last day covered by the last required report. If this is the committee's first report, the beginning date will be the date the initial campaign treasurer appointment was filed. The ending date is the day the dissolution report is filed.

10th Day After Campaign Treasurer Termination Report: The beginning date is the day after the last day covered by the last required report. If this is the committee's first report, the beginning date will be the date the initial campaign treasurer appointment was filed. The ending date is the day the termination is filed. This report is due no later than 10 days after the termination is filed.

If the committee did not accept any contributions or make any expenditures during this reporting period in connection with an upcoming election, skip Section 11.

11. ELECTION: If the committee accepted contributions or made expenditures during this reporting period in connection with an upcoming election, provide the following information concerning the election.

Election Date: Enter the month, day, and year of the election.

Election Type: Check the box next to the type of election that most accurately describes the upcoming election.

Primary - An election held by a political party to select its nominees for office.

Runoff - An election held if no candidate for a particular office receives the vote necessary to be elected in an election requiring a majority vote.

General - An election, other than a primary election, that regularly occurs at fixed dates.

Special - An election that is neither a general election, a primary election, nor a runoff election.

For additional information, see the CAMPAIGN FINANCE GUIDE FOR POLITICAL COMMITTEES.

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12. COMMITTEE NAME: Enter the name of the committee.

13. COMMITTEE PURPOSE: A specific-purpose political committee must identify each candidate or measure that the committee supports or opposes and each officeholder that the committee assists. This information should have been included on your campaign treasurer appointment. If there is a change in this information, you must amend your campaign treasurer appointment to report the change within a specified time period.

Please attach additional copies of this page, if necessary.

Note: Sometimes a specific-purpose political committee is organized to support a particular candidate or measure but later broadens its goals to support a variety of candidates who share the group's views on a particular issue or to support a variety of measures related to an issue. In that case, the committee has become a general-purpose political committee.

If a specific-purpose committee becomes a general-purpose committee, the committee must file a new campaign treasurer appointment (on Form GTA) with the Ethics Commission before it may accept more than \$500 in total political contributions as a general-purpose committee. Further, the committee may not make total political expenditures of more than \$500 as a general-purpose committee unless it has had Form GTA on file with the Ethics Commission for at least 60 days and has accepted contributions from at least 10 persons.

In addition to filing Form GTA with the Ethics Commission, the campaign treasurer of the new general-purpose committee must give notice of the change in status to the filing authority with whom the committee filed reports as a specific-purpose committee. This notice is due no later than the due date for the next report the committee would have had to file as a specific-purpose committee. The notice must state that the committee will file future reports as a general-purpose committee and that those reports will be filed with the Ethics Commission.

14. TOTALS: *Complete this section only after you have completed any applicable schedules.*

Line 1. Enter the total of all unitemized contributions (other than pledges or loans or guarantees of loans) of \$50 or less. Do not include any contributions itemized on Schedule A. If you completed Schedule C, do not include any of those contributions.

On Schedule A, you were required to itemize political contributions that totaled more than \$50 from one person. (Remember: If the committee received contributions *totaling* more than \$50 from one person during the reporting period, you were required to itemize all of those contributions, even if individual contributions were \$50 or less.) You also had the option of itemizing contributions of \$50 or less from one person. Do not include any itemized contributions in the total entered on Line 1, regardless of amount.

Line 2. Add the total contributions listed on Schedule A, and Schedule C if applicable, to the amount you entered on Line 1. Enter that total on Line 2.

Line 3. Enter the total of all unitemized political expenditures of \$50 or less. Do not include any expenditures itemized on Schedule F or H.

On Schedule F, you were required to itemize political expenditures that totaled more than \$50 to one payee. (Remember: If the committee made expenditures *totaling* more than \$50 to one person during the reporting period, you were required to itemize all of those expenditures, even if individual expenditures were \$50 or less.) You also had the option of itemizing expenditures totaling \$50 or less to one payee. Do not include any expenditures itemized on Schedule F in the total entered on Line 3, regardless of amount.

On Schedule H, you were required to itemize payments from political contributions made to certain businesses. Do not include any expenditures itemized on Schedule H in the total entered on Line 3, regardless of the amount.

Line 4. Add the following:

- (a) the total expenditures listed on Schedule F;
- (b) the total expenditures listed on Schedule H; and
- (c) the amount you entered on Line 3.

Enter that total on Line 4.

Line 5. Enter the total amount of political contributions, including interest or other income on those contributions, maintained as of the last day of the reporting period. Enter “0” if you do not maintain political contributions, including interest or other income on those contributions, as of the last day of the reporting period. This is different from the total contributions reported on Line 2. Only contributions accepted during the period covered by the report are entered on Line 2.

Line 6. Enter the aggregate outstanding principal amount of all loans accepted for political purposes as of the last day of the reporting period. This is different from the information reported on Schedule E. Include outstanding principal of loans made in this reporting period as well as outstanding principal of loans made previously.

15. AFFIDAVIT: Complete this Section only after you have completed all applicable sections and schedules.

Only the committee’s campaign treasurer or the assistant campaign treasurer may sign the affidavit.

SCHEDULE A: POLITICAL CONTRIBUTIONS OTHER THAN PLEDGES OR LOANS

These instructions are for specific-purpose committee campaign treasurers using SCHEDULE A: POLITICAL CONTRIBUTIONS OTHER THAN PLEDGES OR LOANS. Enter on this schedule only information about political contributions accepted during the reporting period. You are not required to include contributions of an individual's personal services or travel. Do not enter on this schedule information on pledges, loans, or guarantees of loans. (Report pledges on Schedules B and D; loans and guarantees of loans on Schedule E.)

Corporate or Labor Organization Contributions

Do not enter on this schedule contributions from labor organizations or any of the following business associations:

- (1) corporations that are organized under the Texas Business Corporation Act, the Texas Non-Profit Corporation Act, federal law, or law of another state or nation; or
- (2) the following associations, whether incorporated or not: banks, trust companies, savings and loan associations or companies, insurance companies, reciprocal or interinsurance exchanges, railroad companies, cemetery companies, government-regulated cooperatives, stock companies, and abstract and title insurance companies.

Generally, a specific-purpose committee may not accept corporate or labor organization contributions, unless it supports or opposes measures exclusively. Any corporate or labor organization contributions accepted must be reported on Schedule C.

Itemizing Contributions

You must enter contributions that exceed \$50 from one person during a reporting period on this schedule. If the committee accepted two or more contributions from the same person, the total of which exceeds \$50, enter each contribution separately. Although you are not required to do so, you may also report contributions from one person that do not exceed \$50 in the period on this schedule. If you do not itemize contributions of \$50 and less on this schedule, you must total all such contributions and report them on Form SPAC, Page 2, Section 14, Line 1.

Each numbered item in these instructions corresponds to the same numbered item on the form.

- 1. TOTAL PAGES SCHEDULE A:** After you have completed Schedule A, count the total number of pages. A "page" is one side of a two-sided form.
- 2. FILER NAME:** Enter the committee's full name.
- 3. ACCOUNT #:** If the committee is filing with the Ethics Commission, enter the account number. If the committee does not file with the Ethics Commission, you are not required to enter an account number.
- 4. DATE:** Enter the date the committee *accepted* the contribution.

Accepting a contribution is different from *receiving* a contribution. The committee accepts a contribution when the determination is made to accept it rather than reject it. This may or may not be the same day that the committee receives the contribution.

5. FULL NAME OF CONTRIBUTOR: Enter the full name of the contributor.

“Out-of-State PAC” box: If the contributor is an out-of-state political committee from which the committee accepted more than \$500 in the reporting period (including pledges or loans from sources other than financial institutions that have been in business for more than a year), you must include one of the following with your report:

- a written statement, certified by an officer of the out-of-state political committee, listing the full name and address of each person who contributed more than \$100 to the out-of-state political committee during the 12 months immediately preceding the contribution, or
- a copy of the out-of-state political committee’s statement of organization filed as required by law with the Federal Election Commission (FEC) and certified by an officer of the out-of-state committee.

If the contributor is an out-of-state political committee from which the committee accepted \$500 or less (including pledges) during the reporting period, you must include one of the following with your report:

- a copy of the out-of-state political committee’s statement of organization filed as required by law with the Federal Election Commission (FEC) and certified by an officer of the out-of-state committee, or
- a document listing the committee’s name, address and phone number; the name of the person appointing the committee’s campaign treasurer; and the name, address and phone number of the committee’s campaign treasurer.

“ID #” Line (OPTIONAL): You may include the committee’s Federal Election Commission registration number.

Note: See the CAMPAIGN FINANCE GUIDE FOR POLITICAL COMMITTEES for detailed information on accepting and reporting contributions from out-of-state political committees.

6. CONTRIBUTOR ADDRESS: Enter the complete address of the contributor.

7. AMOUNT OF CONTRIBUTION: Enter the amount of the contribution or the fair market value of an in-kind contribution, as applicable.

8. IN-KIND CONTRIBUTION DESCRIPTION: Enter a description of the contribution, if it was an in-kind contribution. The description should be sufficiently detailed to allow a person reviewing the committee’s report to understand what was contributed.

In-kind Contribution For Out-of-State Travel: The description of an in-kind contribution for travel outside of the state of Texas must include detailed information. Please report this information on Schedule T.

9. PRINCIPAL OCCUPATION OR JOB TITLE: A committee that supports or opposes a candidate for or assists a holder of a statewide office or a legislative office must report the principal job title or occupation of an individual from whom the candidate accepted contributions (including pledges) of \$500 or more during the reporting period. In other circumstances, filers are not required to report this information but may do so.

10. EMPLOYER: A committee that supports or opposes a candidate for or assists a holder of a statewide office or a legislative office must report the employer of an individual from whom the candidate accepted contributions (including pledges) of \$500 or more during the reporting period. In other circumstances, filers are not required to report this information but may do so.

SCHEDULE B: PLEDGED CONTRIBUTIONS

These instructions are for specific-purpose committee campaign treasurers using SCHEDULE B: PLEDGED CONTRIBUTIONS. Enter on this schedule only information about pledges accepted during the reporting period for political purposes. You are not required to include pledges of an individual's personal services or travel. Do not enter on this schedule information on contributions actually received, loans or guarantees of loans. (Report contributions actually received on Schedules A and C; loans and guarantees of loans on Schedule E.)

If the committee *accepts* a *pledge* from a person for money, goods, services, or anything of value, that pledge is a reportable contribution. Note that the committee must accept the pledge before you are required to report the pledge.

If the committee accepts a pledge for money, goods, services, etc., you must include the pledge on this schedule for the report covering the period in which the committee *accepts* the pledge.

Pledges from corporations or labor organizations must be reported on Schedule D.

Each numbered item in these instructions corresponds to the same numbered item on the form.

1. TOTAL PAGES SCHEDULE B: After you have completed Schedule B, count the total number of pages. A “page” is one side of a two-sided form.

2. FILER NAME: Enter the committee’s full name.

3. ACCOUNT #: If the committee is filing with the Ethics Commission, enter the account number. If the committee does not file with the Ethics Commission, you are not required to enter an account number.

4. TOTAL OF UNITEMIZED PLEDGES: Enter the total amount of pledges that the committee accepted during the period from each person that did not exceed \$50 in the aggregate. Although you are not required to do so, you may also itemize pledges of \$50 or less on this schedule. If you itemize some pledges of \$50 or less, do not include those pledges in the total entered here. If you choose to itemize all pledges of \$50 or less, do not enter a total amount here.

Sections 5 - 11 pertain to itemized pledges. You must itemize pledges that exceed \$50 in the aggregate from one person during the reporting period. If the committee received pledges totaling more than \$50 from one person during the reporting period, you must itemize all of those pledges, even if individual pledges were for \$50 or less. Although you are not required to do so, you may also itemize pledges totaling less than \$50 from one person.

5. DATE: Enter the date the committee *accepted* the pledge.

6. FULL NAME OF PLEDGOR: Enter the full name of the person who made the pledge.

“Out-of-State PAC” box: See instructions for Schedule A, box 5.

7. PLEDGOR ADDRESS: Enter the complete address of the person who made the pledge.

8. AMOUNT OF PLEDGE: Enter the amount of the pledge or the fair market value of any pledged goods or services or other thing of value, as applicable.

9. IN-KIND DESCRIPTION: If the pledge was for goods or services or any other thing of value, enter a description of the pledged goods or services or other thing of value. The description should be sufficiently detailed to allow a person reviewing the committee's report to understand what was pledged.

In-kind Contribution For Out-of-State Travel: The description of an in-kind contribution for travel outside of the state of Texas must include detailed information. Please report this information on Schedule T.

10. PRINCIPAL OCCUPATION OR JOB TITLE: See the instructions for Schedule A, box 9.

11. EMPLOYER: See the instructions for Schedule A, box 10.

SCHEDULE C: CORPORATE OR LABOR ORGANIZATION CONTRIBUTIONS OTHER THAN PLEDGES OR LOANS

This schedule is only for specific-purpose committees that support or oppose measures exclusively. If a committee supports or opposes a candidate or assists an officeholder, the committee may not accept corporate or labor organization contributions.

These instructions are for specific-purpose committee campaign treasurers using SCHEDULE C: CORPORATE OR LABOR ORGANIZATION CONTRIBUTIONS OTHER THAN PLEDGES OR LOANS. Enter on this schedule only information about political contributions accepted during the reporting period from corporations, labor organizations, and the business associations listed below. Do not enter on this schedule information on pledges, loans or guarantees of loans from corporations. (Report corporate pledges on Schedule D; loans and guarantees of loans on Schedule E.)

Enter only political contributions accepted during the period from labor organizations and the following business associations:

- (1) corporations that are organized under the Texas Business Corporation Act, the Texas Non-Profit Corporation Act, federal law, or law of another state or nation; or
- (2) the following associations, whether incorporated or not: banks, trust companies, savings and loan associations or companies, insurance companies, reciprocal or interinsurance exchanges, railroad companies, cemetery companies, government-regulated cooperatives, stock companies, and abstract and title insurance companies.

Each numbered item in these instructions corresponds to the same numbered item on the form.

- 1. TOTAL PAGES SCHEDULE C:** After you have completed Schedule C, count the total number of pages. A “page” is one side of a two-sided form.
- 2. FILER NAME:** Enter the committee’s full name.
- 3. ACCOUNT #:** If the committee is filing with the Ethics Commission, enter the account number. If the committee does not file with the Ethics Commission, you are not required to enter an account number.
- 4. DATE:** Enter the date the committee *accepted* the contribution.

Accepting a contribution is different from *receiving* a contribution. The committee accepts a contribution when the determination is made to accept it rather than reject it. This may or may not be the same day that the committee receives the contribution.

- 5. CORPORATION/LABOR ORGANIZATION NAME:** Enter the full name of the corporation or labor organization that made the contribution.
- 6. CORPORATION/LABOR ORGANIZATION ADDRESS:** Enter the complete address of the corporation or labor organization that made the contribution.

7. AMOUNT OF CONTRIBUTION: Enter the amount of the contribution or the fair market value of an in-kind contribution, as applicable.

8. IN-KIND CONTRIBUTION DESCRIPTION: Enter a description of the contribution, if it was an in-kind contribution. The description should be sufficiently detailed to allow a person reviewing the committee's report to understand what was contributed.

In-kind Contribution For Out-of-State Travel: The description of an in-kind contribution for travel outside of the state of Texas must include detailed information. Please report this information on Schedule T.

SCHEDULE D: PLEDGED CORPORATE OR LABOR ORGANIZATION CONTRIBUTIONS

This schedule is only for specific-purpose committees that support or oppose measures exclusively. If a committee supports or opposes a candidate or assists an officeholder, the committee may not accept corporation or labor organization contributions.

These instructions are for specific-purpose committee campaign treasurers using SCHEDULE D: PLEDGED CORPORATE OR LABOR ORGANIZATION CONTRIBUTIONS. Enter on this schedule only information about pledges accepted during the period from corporations, labor organizations, and the business associations listed below. Do not enter on this schedule information on contributions actually received, loans, or guarantees of loans from corporations. (Report corporate contributions actually received on Schedule C; loans and guarantees of loans on Schedule E.)

Enter only pledges accepted during the period from labor organizations and the following business associations:

- (1) corporations that are organized under the Texas Business Corporation Act, the Texas Non-Profit Corporation Act, federal law, or law of another state or nation; or
- (2) the following associations, whether incorporated or not: banks, trust companies, savings and loan associations or companies, insurance companies, reciprocal or interinsurance exchanges, railroad companies, cemetery companies, government-regulated cooperatives, stock companies, and abstract and title insurance companies.

If the committee *accepts* a *pledge* from a corporation or labor organization for money, goods, services, or anything of value, that pledge is a reportable contribution. Note that the committee must accept the pledge before you are required to report the pledge. You must include the pledge on this schedule for the report covering the period in which the committee *accepts* the pledge.

Each numbered item in these instructions corresponds to the same numbered item on the form.

- 1. TOTAL PAGES SCHEDULE D:** After you have completed Schedule D, count the total number of pages. A “page” is one side of a two-sided form.
- 2. FILER NAME:** Enter the committee’s full name.
- 3. ACCOUNT #:** If the committee is filing with the Ethics Commission, enter the account number. If the committee does not file with the Ethics Commission, you are not required to enter an account number.
- 4. DATE:** Enter the date the committee *accepted* the pledge.
- 5. CORPORATION/LABOR ORGANIZATION NAME:** Enter the full name of the corporation or labor organization that made the pledge.

6. CORPORATION/LABOR ORGANIZATION ADDRESS: Enter the complete address of the corporation or labor organization that made the pledge.

7. AMOUNT OF PLEDGE: Enter the amount of the pledge or the fair market value of any pledged goods or services or other thing of value, as applicable.

8. IN-KIND DESCRIPTION: Enter a description of the pledged goods or services or other thing of value, if the pledge was for goods or services or any other thing of value. The description should be sufficiently detailed to allow a person reviewing the committee's report to understand what was pledged.

In-kind Contribution For Out-of-State Travel: The description of an in-kind contribution for travel outside of the state of Texas must include detailed information. Please report this information on Schedule T.

SCHEDULE E: LOANS

These instructions are for specific-purpose committee campaign treasurers using SCHEDULE E: LOANS. Enter on this schedule only information about loans, and guarantees of loans, accepted during the reporting period for political purposes.

You must itemize loans that exceed \$50 that the committee accepted during the period from one person. If the committee accepted two or more loans from the same person, the total of which exceeds \$50, itemize each loan separately. Although you are not required to do so, you may also itemize loans that do not exceed \$50.

Each numbered item in these instructions corresponds to the same numbered item on the form.

1. TOTAL PAGES SCHEDULE E: After you have completed Schedule E, count the total number of pages. A “page” is one side of a two-sided form.

2. FILER NAME: Enter the committee’s full name.

3. ACCOUNT #: If the committee is filing with the Ethics Commission, enter the account number. If the committee does not file with the Ethics Commission, you are not required to enter an account number.

4. TOTAL OF UNITEMIZED LOANS: Enter the total amount of loans accepted during the reporting period that did not exceed \$50 in the aggregate per person and were not from financial institutions. Only a specific-purpose committee for supporting or opposing measures exclusively may accept a loan from a corporation other than a financial institution that has been legally engaged in the business of making loans for more than one year.

Although you are not required to do so, you may also itemize loans of \$50 or less from persons other than financial institutions on this schedule. If you itemize some loans of \$50 or less, do not include those loans in the total you enter here. If you choose to itemize all loans of \$50 or less, do not enter a total amount here.

5. DATE OF LOAN: Enter the date the committee accepted the loan.

6. IS LENDER A FINANCIAL INSTITUTION?: If the committee accepted the loan from a corporation that has been legally engaged in the business of making loans for more than one year, circle the “Y” for yes. If the committee accepted the loan from any other source, circle “N” for no. Remember that a loan from a corporation is an illegal corporate contribution unless it is from a corporation that is a financial institution that has been legally engaged in the business of making loans for more than one year.

7. NAME OF LENDER: Enter the full name of the person or financial institution that made the loan.

“Out-of-State PAC” box: See instructions for Schedule A, box 5.

8. LENDER ADDRESS: Enter the complete address of the person or financial institution that made the loan.

9. LOAN AMOUNT: Enter the principal amount of the loan.

10. INTEREST RATE: Enter the interest rate.

11. MATURITY DATE: Enter the maturity date.

12. PRINCIPAL OCCUPATION OR JOB TITLE: A committee that supports or opposes a candidate for or assists a holder of a statewide office in the executive branch or a candidate for or holder of a legislative office must disclose the principal occupation or job title of each individual from whom the committee has accepted a loan (including a pledge of a loan) of \$500 or more during the reporting period. This requirement applies to loans from individuals that are accepted on or after January 1, 2004.

Other types of filers are not required to report this information but may do so.

13. EMPLOYER: A committee that supports or opposes a candidate for or assists a holder of a statewide office in the executive branch or a candidate for or holder of a legislative office must disclose the full name of the employer of each individual from whom the committee has accepted a loan (including a pledge of a loan) of \$500 or more during the reporting period. This requirement applies to loans from individuals that are accepted on or after January 1, 2004.

Other types of filers are not required to report this information but may do so.

14. DESCRIPTION OF COLLATERAL: If there is no collateral for the loan, check the “none” box and go to Section 13. If there is collateral for the loan, enter a description of the collateral for the loan.

15. GUARANTOR INFORMATION: If there are no guarantors for the loan, check the “NOT APPLICABLE” box and go to the next loan. If you have no further loans to report, go to the next applicable schedule.

Note: A person who guarantees all or part of a loan makes a reportable contribution in the amount of the guarantee. You must report such a contribution on this schedule, and not on Schedule A.

16. NAME OF GUARANTOR: Enter the full name of the guarantor.

17. GUARANTOR ADDRESS: Enter the complete address of the guarantor.

18. AMOUNT GUARANTEED: Enter the dollar amount of the loan that the guarantor has agreed to guarantee.

19. PRINCIPAL OCCUPATION: Enter the principal occupation of the guarantor.

20. EMPLOYER: Enter the employer of the guarantor.

SCHEDULE F: POLITICAL EXPENDITURES

These instructions are for specific-purpose committee campaign treasurers using SCHEDULE F: POLITICAL EXPENDITURES. Enter on this schedule only information about political expenditures made or authorized during the reporting period.

You must enter political expenditures made to an individual or entity during a reporting period that exceed \$50 under this schedule. If the committee made more than one expenditure to the same payee, the total of which exceeded \$50, enter each expenditure separately. Although you are not required to do so, you may report expenditures to one person that do not exceed \$50 on this schedule. If you choose not to itemize expenditures of \$50 and less on this schedule, you must total all unitemized expenditures and report them on Form SPAC, Page 2, Section 14, Line 3.

Each numbered item in these instructions corresponds to the same numbered item on the form.

1. TOTAL PAGES SCHEDULE F: After you have completed Schedule F, count the total number of pages. A “page” is one side of a two-sided form.

2. FILER NAME: Enter the committee’s full name.

3. ACCOUNT #: If the committee is filing with the Ethics Commission, enter the account number. If the committee does not file with the Ethics Commission, you are not required to enter an account number.

4. DATE: Enter the date the expenditure was made. The date of an expenditure is not necessarily the date goods or services are received. It is the date on which the obligation to make a payment is incurred, as long as the amount of the payment is “readily determinable.” Generally, the amount of an expenditure is known (and therefore readily determinable) when the obligation is incurred, but in some cases the amount is not known until the receipt of a bill. For example, filers will generally not know the cost of a long-distance telephone call until receipt of a monthly bill. In that case, the date of the expenditure for the telephone call would be the date the bill was received.

Credit card expenditures. There is a special reporting rule for expenditures made by credit card. For reports due 30 days and 8 days before an election, the date of a credit card expenditure is the date the credit card is used. For other reports, the date of a credit card expenditure is the date the credit card statement is received.

5. PAYEE NAME: Enter the full name of the person to whom the expenditure was made.

Note: If the expenditure was by credit card, enter the name of the vendor who sold you the goods or services, not the name of the credit card issuer.

Note: If you make an expenditure for goods or services to benefit a candidate, officeholder, or other committee, enter the name of the vendor who sold the goods or services to the committee. Do not enter the name of the person for whose benefit the committee made the expenditure. Include that information under Section 8, “Purpose of Payment.”

6. PAYEE ADDRESS: Enter the complete address of the person to whom the expenditure was made.

7. AMOUNT: Enter the exact amount of the expenditure.

8. PURPOSE OF PAYMENT: In describing the purpose of an expenditure, state whether the expenditure was to support or oppose a candidate, officeholder, political party, or ballot measure. Identify the candidate, officeholder, political party, or ballot measure. Also include the nature of the goods or services purchased.

Purpose of Expenditure For Out-of-State Travel: The description of a political expenditure for travel outside of the state of Texas must include detailed information. Please report this information on Schedule T.

9. DIRECT CAMPAIGN EXPENDITURE TO BENEFIT CANDIDATE/OFFICEHOLDER: If the committee made a direct campaign expenditure to benefit a candidate or officeholder, enter the full name of the candidate or officeholder and the name of the office sought or held, including the district, precinct, or other designation of the office, as applicable. (Attach additional sheets to list multiple candidates.) Do not complete this Section if the expenditure was not a direct campaign expenditure.

A “direct campaign expenditure” to benefit a candidate is not a “political contribution” to that candidate. A direct campaign expenditure is a campaign expenditure that the committee makes on someone else’s behalf and without the prior consent or approval of that person. This is in contrast to a political contribution, which the person has the opportunity to accept or reject.

Example: If the committee made expenditures to prepare and distribute an endorsement letter in support of a candidate after first asking for and getting the candidate’s approval, the committee made an *in-kind contribution*. However, if the committee did not get the candidate’s approval *before* it made the expenditure, the committee made a *direct campaign expenditure*.

If the committee makes political expenditures or accepts political contributions in support of a candidate, officeholder or other political committee, the committee must provide written notice to the candidate, officeholder, or committee who benefits from the committee’s activity. The notice must inform the person that the committee has made political expenditures or accepted political contributions on his or her behalf, and it must include the committee’s full name and complete address (street address or P.O. Box, city, state, and zip code). The notice must be given before the end of the reporting period during which the committee made the political expenditures or accepted the political contributions.

You Do Not Need Schedule G. Schedule G is for candidates and officeholders to report political expenditures that were made from personal funds.

SCHEDULE H: PAYMENT FROM POLITICAL CONTRIBUTIONS TO A BUSINESS OF C/OH

These instructions are for specific-purpose committees using SCHEDULE H: PAYMENT FROM POLITICAL CONTRIBUTIONS TO A BUSINESS OF C/OH. Enter on this schedule only information about payments from political contributions that were made to a business in which a candidate supported by the committee or an officeholder assisted by the committee has an interest of more than 10%, a position on the governing body, or a position as an officer. Do not enter on this schedule other payments from political contributions authorized during the reporting period.

See the *CAMPAIGN FINANCE GUIDE FOR POLITICAL COMMITTEES* for a discussion on the important restrictions on making and reporting payments from political contributions to a business in which a candidate supported by the committee or an officeholder assisted by the committee has an interest.

This schedule is for payments to a business in which a candidate supported by the committee or an officeholder assisted by the committee has one or more of the following interests or positions:

- (1) a participating interest of more than 10%;
- (2) a position on the governing body of the business;
- (3) a position as an officer of the business.

Report such payments on this schedule and not on Schedule F.

Each numbered item in these instructions corresponds to the same numbered item on the form.

- 1. TOTAL PAGES SCHEDULE H:** After you have completed Schedule H, count the total number of pages. A “page” is one side of a two-sided form.
- 2. FILER NAME:** Enter the committee’s full name.
- 3. ACCOUNT #:** If the committee is filing with the Ethics Commission, enter the account number. If the committee does not file with the Ethics Commission, you are not required to enter an account number.
- 4. DATE:** Enter the date the committee made or authorized the payment. See the instructions for Schedule F, box 4.
- 5. BUSINESS NAME:** Enter the full name of the business to which the committee made the payment.
- 6. BUSINESS ADDRESS:** Enter the complete address of the business to which the committee made the payment.
- 7. AMOUNT:** Enter the dollar amount of the payment.

8. PURPOSE OF PAYMENT: Describe the purpose for which the committee made the payment. If the payment was to purchase or lease goods or services, enter a description of the goods or services so that a person reviewing the committee’s report could know what goods or services were purchased or leased.

Purpose of Expenditure For Out-of-State Travel: The description of a political expenditure for travel outside of the state of Texas must include detailed information. Please report this information on Schedule T.

9. DIRECT CAMPAIGN EXPENDITURE TO BENEFIT OTHER CANDIDATE OR OFFICEHOLDER: If the payment was a “direct campaign expenditure” to benefit a candidate or officeholder, enter the full name of the candidate or officeholder and the name of the office sought or held, including the district, precinct, or other designation of the office, as applicable. (Attach additional sheets to list multiple candidates.) Do not complete this Section if the payment was not a direct campaign expenditure.

A “direct campaign expenditure” to benefit a candidate is not a “political contribution” to that candidate. A direct campaign expenditure is a campaign expenditure that the committee makes on someone else’s behalf and without the prior consent or approval of that person. This is in contrast to a political contribution, which the person has the opportunity to accept or reject.

Example: If the committee made expenditures to prepare and distribute an endorsement letter in support of a candidate after first asking for and getting the candidate’s approval, the committee made an *in-kind contribution*. However, if the committee did not get the candidate’s approval *before* it made the expenditure, the committee made a *direct campaign expenditure*.

If the committee makes political expenditures or accepts political contributions in support of a candidate, officeholder, or other political committee, the committee must provide written notice to the candidate, officeholder, or committee who benefits from the committee’s activity. The notice must inform the person that the committee has made political expenditures or accepted political contributions on his or her behalf, and it must include the committee’s full name and complete address. Include your street address or P.O. Box, city, state, and ZIP Code. The notice must be given before the end of the reporting period during which the committee made the political expenditures or accepted the political contributions.

SCHEDULE I: NON-POLITICAL EXPENDITURES MADE FROM POLITICAL CONTRIBUTIONS

These instructions are for specific-purpose committee campaign treasurers using SCHEDULE I: NON-POLITICAL EXPENDITURES MADE FROM POLITICAL CONTRIBUTIONS. Enter on this schedule only information about non-political expenditures from political contributions that were made or authorized during the reporting period. Do not enter political expenditures on this schedule. (Report political expenditures on Schedule F.) Do not report non-political expenditures from political contributions made to a business in which a candidate supported by the committee or an officeholder assisted by the committee has a participating interest of more than 10%, a position on the governing body, or a position as an officer. (Report those expenditures on Schedule H.)

You must enter all non-political expenditures from political contributions on this schedule, regardless of the amount. A non-political expenditure is an expenditure that is neither a campaign expenditure nor an officeholder expenditure. Remember that you may not convert political contributions to personal use.

Each numbered item in these instructions corresponds to the same numbered item on the form.

- 1. TOTAL PAGES SCHEDULE I:** After you have completed Schedule I, count the total number of pages. A “page” is one side of a two-sided form.
- 2. FILER NAME:** Enter the committee’s full name.
- 3. ACCOUNT #:** If the committee is filing with the Ethics Commission, enter the account number. If the committee does not file with the Ethics Commission, you are not required to enter an account number.
- 4. DATE:** Enter the date the expenditure was made. See the instructions for Schedule F, box 4.
- 5. PAYEE NAME:** Enter the full name of the person to whom the expenditure was made.
- 6. PAYEE ADDRESS:** Enter the complete address of the person to whom the expenditure was made.
- 7. PURPOSE OF EXPENDITURE:** Enter the nature of the goods or services or other thing of value for which the expenditure was made so that a person reviewing the committee's report could know what goods or services or other thing of value were purchased or leased.
- 8. AMOUNT:** Enter the exact amount of the expenditure.

SCHEDULE J: POLITICAL CONTRIBUTIONS RETURNED TO COMMITTEE

These instructions are for specific-purpose committee campaign treasurers using SCHEDULE J: POLITICAL CONTRIBUTIONS RETURNED TO COMMITTEE. Enter on this schedule only information about political expenditures that were originally made as political contributions and were returned to the committee during the reporting period.

Each numbered item in these instructions corresponds to the same numbered item on the form.

- 1. TOTAL PAGES SCHEDULE J:** After you have completed Schedule J, count the total number of pages. A “page” is one side of a two-sided form.
- 2. FILER NAME:** Enter the committee’s full name.
- 3. ACCOUNT #:** If the committee is filing with the Ethics Commission, enter the account number. If the committee does not file with the Ethics Commission, you are not required to enter an account number.
- 4. DATE RETURNED:** Enter the date the contribution was returned to the committee or an agent of the committee.
- 5. ORIGINAL PAYEE NAME:** Enter the full name of the person to whom the expenditure was originally made.
- 6. ORIGINAL PAYEE ADDRESS:** Enter the complete address of the person to whom the expenditure was made.
- 7. AMOUNT RETURNED:** Enter the dollar amount of the expenditure that was returned.

SCHEDULE K: CREDITS

THIS SCHEDULE IS OPTIONAL

This schedule provides a way to report rebates, deposit returns, and credits or refunds. There is no legal requirement to report such items. Examples of things that could be reported on this schedule include:

- a return of a security deposit.
- a refund of an overpayment.

Please do not include these types of credits in your contributions totals or on any other schedule.

Each numbered item in these instructions corresponds to the same numbered item on the form.

- 1. TOTAL PAGES SCHEDULE K:** After you have completed Schedule K, count the total number of pages. A “page” is one side of a two-sided form.
- 2. FILER NAME:** Enter the committee’s full name.
- 3. ACCOUNT #:** If the committee is filing with the Ethics Commission, enter the account number. If the committee does not file with the Ethics Commission, you are not required to enter an account number.
- 4. DATE:** Enter the date the credit was received.
- 5. PAYOR NAME:** Enter the name of the person or business who paid the credit.
- 6. PAYOR ADDRESS:** Enter the complete address of the person or business who paid the credit.
- 7. REASON FOR CREDIT:** Enter the reason for the credit (for example, “phone service deposit return” or “rebate”).
- 8. AMOUNT:** Enter the exact dollar amount of the credit.

SCHEDULE T: IN-KIND CONTRIBUTION OR POLITICAL EXPENDITURE FOR TRAVEL OUTSIDE OF TEXAS

These instructions are for candidates, officeholders, committees, or political parties using SCHEDULE T: IN-KIND CONTRIBUTION OR POLITICAL EXPENDITURE FOR TRAVEL OUTSIDE OF TEXAS. Enter on this schedule only information about contributions accepted or expenditures made during the reporting period. In addition to completing this schedule, you must also report the actual contribution or expenditure on the appropriate schedule or form.

NOTE: The law requires detailed information regarding in-kind contributions or political expenditures for travel outside of the state of Texas.

Each numbered item in these instructions corresponds to the same numbered item on the form.

- 1. TOTAL PAGES SCHEDULE T:** After you have completed Schedule T, count the total number of pages. A “page” is one side of a two-sided form.
- 2. FILER NAME:** Enter the full name of the candidate, committee, or party on whose report you are including this schedule.
- 3. ACCOUNT #:** If you are filing with the Ethics Commission, enter your account number. If you do not file with the Ethics Commission, you are not required to enter an account number.
- 4. NAME OF CONTRIBUTOR / CORPORATION OR LABOR ORGANIZATION / PLEDGOR / PAYEE:** Enter the full name of the contributor / corporation or labor organization / pledgor / payee as it appears on the schedule or form on which you reported the actual contribution or expenditure.
- 5. CONTRIBUTION / EXPENDITURE REPORTED ON:** Check the appropriate box for the schedule or form on which you reported the actual contribution or expenditure
- 6. DATES OF TRAVEL:** Enter the dates on which the travel occurred.
- 7. NAME OF PERSON(S) TRAVELING:** Enter the name of the person or persons traveling on whose behalf the travel was accepted or on whose behalf the expenditure was made.
- 8. DEPARTURE CITY OR NAME OF DEPARTURE LOCATION:** Enter the name of the departure city or the name of each departure location.
- 9. DESTINATION CITY OR NAME OF DESTINATION LOCATION:** Enter the name of the destination city or the name of each destination location.
- 10. MEANS OF TRANSPORTATION:** Enter the method of travel (i.e. airplane, bus, boat, car, etc.)
- 11. PURPOSE OF TRAVEL:** Enter the campaign or officeholder purpose of the travel, including the name of a conference, seminar, or other event.

FORM PAC-DR: POLITICAL COMMITTEE AFFIDAVIT OF DISSOLUTION

These instructions are for specific-purpose committee campaign treasurers using FORM PAC-DR: POLITICAL COMMITTEE AFFIDAVIT OF DISSOLUTION. The committee's campaign treasurer must file a dissolution report in order to dissolve the committee. A dissolution report must include this form (PAC-DR) and the SPECIFIC-PURPOSE COMMITTEE CAMPAIGN FINANCE REPORT (Form SPAC) with the "Dissolution" box checked in Section 9 on the Cover Sheet.

The campaign treasurer of a specific-purpose committee may file a dissolution report when the committee does not expect to accept any more political contributions or make any more political expenditures. Filing a dissolution report terminates the specific-purpose committee's campaign treasurer appointment. The dissolution report serves as the campaign treasurer's termination report.

Each numbered item in these instructions corresponds to the same numbered item on the form.

- 1. COMMITTEE NAME:** Enter the committee's full name.
- 2. ACCOUNT #:** If the committee is filing with the Ethics Commission, enter the account number. If the committee does not file with the Ethics Commission, you are not required to enter an account number.
- 3. "AFFIDAVIT OF DISSOLUTION" Statement and Signature:** Read the statement carefully and sign only if the statement applies to the committee.