

**STATE OF FLORIDA
FLORIDA ELECTIONS COMMISSION**

In Re: Jacqueline Perez

Case No.: FEC 21-132

TO: Jacqueline Perez
17675 Boat Club Drive
Ft. Myers, FL 33908-4467

Cheryl Futch, Qualifying Officer
Lee County SOE's Office
2480 Thompson Street
Ft. Myers, FL 33901

NOTICE OF HEARING (INFORMAL HEARINGS (IH))

A hearing will be held in this case before the Florida Elections Commission on, **August 19, 2025 at 9:00 a.m., or as soon thereafter as the parties can be heard**, at the following location: **Virtual Meeting via Webinar link: <https://register.gotowebinar.com/register/3863768971242962781> and Webinar ID 748-293-987.**

Failure to appear in accordance with this notice will constitute a waiver of your right to participate in the hearing. Continuances will be granted only upon a showing of good cause.

This hearing will be conducted pursuant to Section 106.25, Florida Statutes, which governs your participation as follows:

If you are the Respondent, you may attend the hearing, and you or your attorney will have *5 minutes* to present your case to the Commission. However, some cases (including those in which consent orders or recommendations for no probable cause are being considered) may be decided by an *en masse* vote and, unless you request to be heard or the Commission requests that your case be considered separately on the day of the hearing, your case will *not* be individually heard.

If you are the Complainant, you may attend the hearing, but you will *not* be permitted to address the Commission. In addition, some cases (including those in which consent orders or recommendations for no probable cause are being considered) may be decided by an *en masse* vote and, unless the Respondent requests to be heard or the Commission requests that the case be considered separately on the day of the hearing, the case will *not* be individually heard.

If you are an Appellant, and you have requested a hearing, you may attend the hearing, and you or your attorney will have *5 minutes* to present your case to the Commission.

Please be advised that both confidential and public cases are scheduled to be heard by the Florida Elections Commission on this date. As an Appellant, Respondent or Complainant in one case, you will *not* be permitted to attend the hearings on other confidential cases.

The Commission will electronically record the meeting. Although the Commission's recording is considered the official record of the hearing, the Respondent may provide, at his own expense, a certified court reporter to also record the hearing.

If you require an accommodation due to a disability, contact Donna Ann Malphurs at (850) 922-4539 or by mail at 107 West Gaines Street, The Collins Building, Suite 224, Tallahassee, Florida 32399, at least 5 days before the hearing.

See further instructions on the reverse side.

Tim Vaccaro
Executive Director
Florida Elections Commission
July 28, 2025

Please refer to the information below for further instructions related to your particular hearing:

If this is a hearing to consider **an appeal from an automatic fine**, the Filing Officer has imposed a fine on you for your failure to file a campaign treasurer's report on the designated due date and, by filing an appeal, you have asked the Commission to consider either (1) that the report was in fact timely filed; or (2) that there were unusual circumstances that excused the failure to file the report timely. You are required to prove your case. If the Commission finds that the report was filed timely or that there were unusual circumstances that excused the failure, it may waive the fine, in whole or in part. The Commission may reduce a fine after considering the factors in Section 106.265, Florida Statutes. If the Commission finds that the report was not timely filed and there were no unusual circumstances, the fine will be upheld.

If this is a hearing to consider a **consent order before a determination of probable cause has been made**, the Commission will decide whether to accept or reject the consent order. If the Commission accepts the consent order, the case will be closed and become public. If the Commission rejects the consent order or does not make a decision to accept or deny the consent order, the case will remain confidential, unless confidentiality has been waived.

If this is a hearing to consider a **consent order after a determination of probable cause has been made**, the Commission will decide whether to accept or reject the consent order. If the Commission accepts the consent order, the case will be closed. If the Commission rejects the consent order or does not make a decision to accept or deny the consent order, the Respondent will be entitled to another hearing to determine if the Respondent committed the violation(s) alleged.

If this is a **probable cause hearing**, the Commission will decide if there is probable cause to believe that the Respondent committed a violation of Florida's election laws. Respondent should be prepared to explain how the staff in its recommendation incorrectly applied the law to the facts of the case. *Respondent may not testify, call others to testify, or introduce any documentary or other evidence at the probable cause hearing.* The Commission will only decide whether Respondent should be *charged* with a violation and, before the Commission determines whether a violation has occurred or a fine should be imposed, Respondent will have an opportunity for another hearing at which evidence may be introduced.

If this is an **informal hearing**, it will be conducted pursuant Sections 120.569 and 120.57(2), Florida Statutes; Chapter 28 and Commission Rule 2B-1.004, Florida Administrative Code. At the hearing, the Commission will decide whether the Respondent committed the violation(s) charged in the Order of Probable Cause. The Respondent will be permitted to testify. However, the Respondent may not call witnesses to testify.

Respondent may argue why the established facts in the Staff Recommendation do not support the violations charged in the Order of Probable Cause. At Respondent's request, the Commission may determine whether Respondent's actions in the case were willful. The Respondent may also address the appropriateness of the recommended fine. If Respondent claims that his limited resources make him unable to pay the statutory fine, *he must provide the Commission with written proof of his financial resources* at the hearing. A financial affidavit form is available from the Commission Clerk.

**STATE OF FLORIDA
FLORIDA ELECTIONS COMMISSION**

In Re: Jacqueline Perez

Case No.: FEC 21-132

TO: Jacqueline Perez
17675 Boat Club Drive
Ft. Myers, FL 33908-4467

Cheryl Futch, Qualifying Officer
Lee County SOE's Office
2480 Thompson Street
Ft. Myers, FL 33901

NOTICE OF CANCELLATION OF HEARING (INFORMAL HEARING)

You are hereby notified that the previously scheduled hearing for February 26 and 27, 2025, is cancelled. It is anticipated that your case will be heard at the next regularly scheduled meeting, on a date to be determined. A Notice of Hearing will be mailed approximately 14 days prior to the new hearing date.

Tim Vaccaro

Executive Director
Florida Elections Commission
February 24, 2025

**STATE OF FLORIDA
FLORIDA ELECTIONS COMMISSION**

In Re: Jacqueline Perez

Case No.: FEC 21-132

TO: Jacqueline Perez
17675 Boat Club Drive
Ft. Myers, FL 33908-4467

Cheryl Futch, Qualifying Officer
Lee County SOE's Office
2480 Thompson Street
Ft. Myers, FL 33901

NOTICE OF HEARING (INFORMAL HEARING)

A hearing will be held in this case before the Florida Elections Commission on, **February 26, 2025 at 9:00 a.m., or as soon thereafter as the parties can be heard**, at the following location: **412 Knott Building, Pat Thomas Committee Room, 404 South Monroe Street, Tallahassee, Florida 32399**. Due to heightened security access requirements, please bring only essential items into the building and plan to arrive early to allow for delays coming through security.

Failure to appear in accordance with this notice will constitute a waiver of your right to participate in the hearing. Continuances will be granted only upon a showing of good cause.

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If you are the Complainant, you may attend the hearing, but you will *not* be permitted to address the Commission. In addition, some cases (including those in which consent orders or recommendations for no probable cause are being considered) may be decided by an *en masse* vote and, unless the Respondent requests to be heard or the Commission requests that the case be considered separately on the day of the hearing, the case will *not* be individually heard.

If you are an Appellant, and you have requested a hearing, you may attend the hearing, and you or your attorney will have *5 minutes* to present your case to the Commission.

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See further instructions on the reverse side.

Tim Vaccaro

Executive Director
Florida Elections Commission
February 5, 2025

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If this is a hearing to consider **an appeal from an automatic fine**, the Filing Officer has imposed a fine on you for your failure to file a campaign treasurer's report on the designated due date and, by filing an appeal, you have asked the Commission to consider either (1) that the report was in fact timely filed; or (2) that there were unusual circumstances that excused the failure to file the report timely. You are required to prove your case. If the Commission finds that the report was filed timely or that there were unusual circumstances that excused the failure, it may waive the fine, in whole or in part. The Commission may reduce a fine after considering the factors in Section 106.265, Florida Statutes. If the Commission finds that the report was not timely filed and there were no unusual circumstances, the fine will be upheld.

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If this is a **probable cause hearing**, the Commission will decide if there is probable cause to believe that the Respondent committed a violation of Florida's election laws. Respondent should be prepared to explain how the staff in its recommendation incorrectly applied the law to the facts of the case. *Respondent may not testify, call others to testify, or introduce any documentary or other evidence at the probable cause hearing.* The Commission will only decide whether Respondent should be *charged* with a violation and, before the Commission determines whether a violation has occurred or a fine should be imposed, Respondent will have an opportunity for another hearing at which evidence may be introduced.

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Respondent may argue why the established facts in the Staff Recommendation do not support the violations charged in the Order of Probable Cause. At Respondent's request, the Commission may determine whether Respondent's actions in the case were willful. The Respondent may also address the appropriateness of the recommended fine. If Respondent claims that his limited resources make him unable to pay the statutory fine, *he must provide the Commission with written proof of his financial resources* at the hearing. A financial affidavit form is available from the Commission Clerk.

**STATE OF FLORIDA
FLORIDA ELECTIONS COMMISSION**

**Florida Elections Commission,
Petitioner,**

Case No.: FEC 21-132

v.

**Jacqueline Perez,
Respondent.**

_____/

ORDER OF PROBABLE CAUSE

THIS MATTER was heard by the Florida Elections Commission (Commission) at its regularly scheduled meeting on August 14, 2024, in Tallahassee, Florida.

On January 23, 2024, Staff recommended to the Commission that there was probable cause to believe that the Florida Election Code was violated. The facts articulated in Staff's Recommendation are adopted by reference and incorporated herein. Based on the Complaint, Report of Investigation, Staff's Recommendation, and oral statements (if any) made at the probable cause hearing, the Commission finds that there is **probable cause** to charge Respondent with the following violation(s):

Count 1:

On February 1, 2021, Jacqueline Perez violated Section 106.07(5), Florida Statutes, when she certified that the campaign's 20-TRG Report was true, correct, and complete when it was not.

THIS SPACE INTENTIONALLY LEFT BLANK

The Commission finds that there is **no probable cause** to charge Respondent with violating Sections 106.19(1)(b), 106.19(1)(c), and 106.19(1)(d), Florida Statutes.

DONE AND ORDERED by the Florida Elections Commission on August 14, 2024.



Tim Vaccaro, J.D., Executive Director
For Chad Mizelle, Chairman
Florida Elections Commission

Copies furnished to:
Mattie T. Clay, Assistant General Counsel
Jacqueline Perez, Respondent
Cheryl Futch, Complainant

NOTICE OF RIGHT TO A HEARING

As the Respondent, you may elect to resolve this case in several ways. First, you may elect to resolve this case by consent order where you and Commission staff agree to resolve the violation(s) and agree to the amount of the fine. The consent order is then presented to the Commission for its approval. To discuss a consent order, contact the FEC attorney identified in the Order of Probable Cause.

Second, you may request an informal hearing held before the Commission, if you do not dispute any material fact in the Staff Recommendation. You have 30 days from the date the Order of Probable Cause is filed with the Commission to request such a hearing. The date this order was filed appears in the upper right-hand corner of the first page of the order. At the hearing, you will have the right to make written or oral arguments to the Commission concerning the legal issues related to the violation(s) and the potential fine. At the request of Respondent, the Commission will consider and determine willfulness at an informal hearing. Otherwise, live witness testimony is unnecessary.

Third, you may request a formal hearing held before an administrative law judge in the Division of Administrative Hearings (DOAH), if you dispute any material fact in the Staff Recommendation. You have 30 days from the date the Order of Probable Cause is filed with the Commission to request such a hearing. The date this order was filed appears in the upper right-hand corner of the first page of the order. At the hearing, you will have the right to present evidence relevant to the violation(s) listed in this order, to cross-examine opposing witnesses, to impeach any witness, and to rebut the evidence presented against you.

If you do not elect to resolve the case by consent order or request a formal hearing at the DOAH

or an informal hearing before the Commission within 30 days of the date this Order of Probable Cause is filed with the Commission, the case will be sent to the Commission for a formal or informal hearing, depending on whether the facts are in dispute. The date this order was filed appears in the upper right-hand corner of the first page of the order.

To request a hearing, please send a written request to the Commission Clerk, Donna Ann Malphurs. The address of the Commission Clerk is 107 W. Gaines Street, Collins Building, Suite 224, Tallahassee, Florida 32399-1050. The telephone number is (850) 922-4539. The Clerk will provide you with a copy of Chapter 28-106, *Florida Administrative Code*, and other applicable rules upon request. No mediation is available.

**STATE OF FLORIDA
FLORIDA ELECTIONS COMMISSION**

In Re: Jacqueline Perez

Case No.: FEC 21-132

TO: Jacqueline Perez
17675 Boat Club Drive
Ft. Myers, FL 33908-4467

Cheryl Futch, Qualifying Officer
Lee County SOE's Office
2480 Thompson Street
Ft. Myers, FL 33901

NOTICE OF HEARING (PROBABLE CAUSE DETERMINATION (PCD))

A hearing will be held in this case before the Florida Elections Commission on, **August 14, 2024 at 9:00 a.m., or as soon thereafter as the parties can be heard**, at the following location: **412 Knott Building, Pat Thomas Committee Room, 404 South Monroe Street, Tallahassee, Florida 32399**. Due to heightened security access requirements, please bring only essential items into the building and plan to arrive early to allow for delays coming through security.

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Tim Vaccaro

Executive Director
Florida Elections Commission
July 23, 2024

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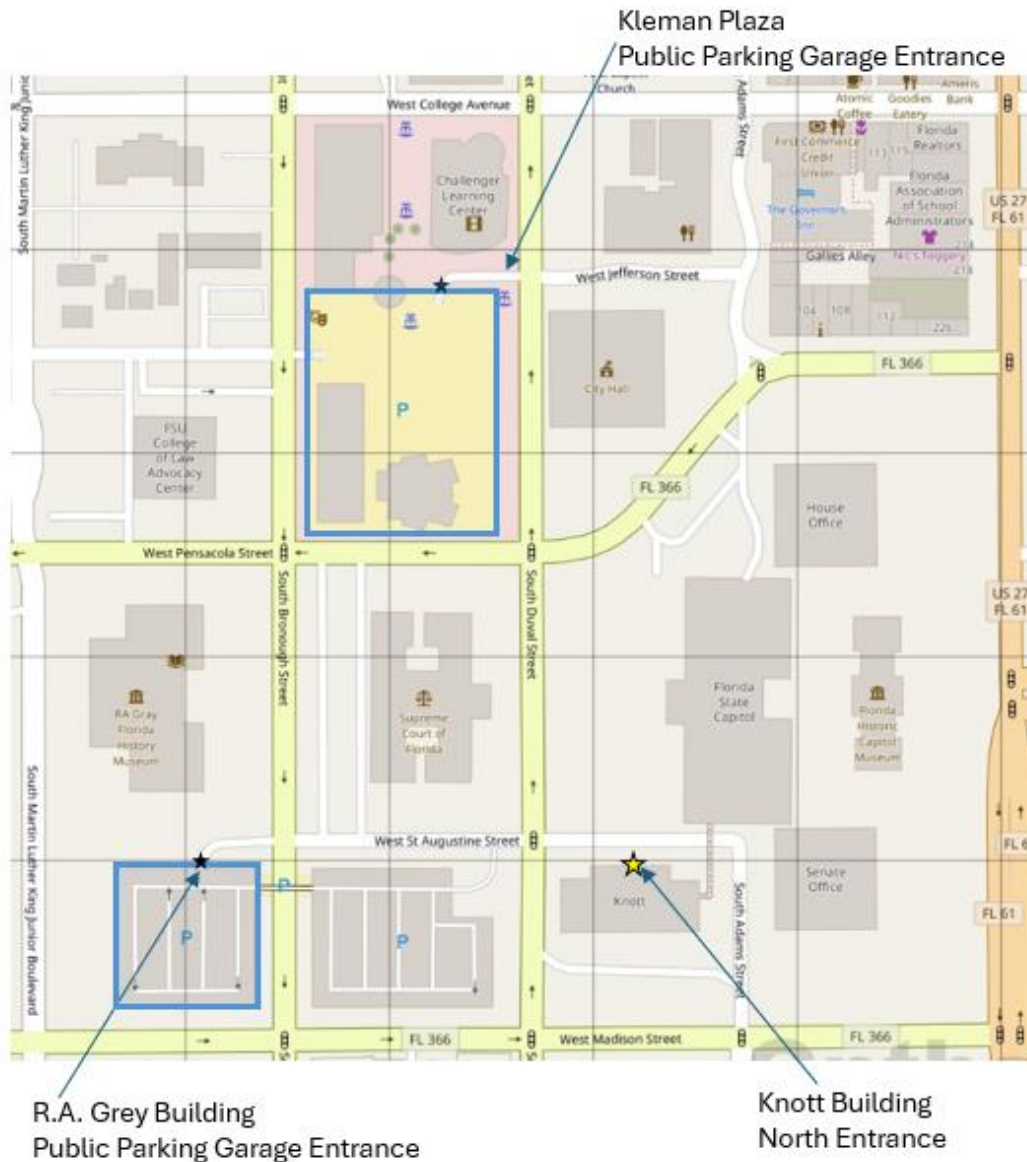
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Florida Elections Commission Meeting - Augut 13-14, 2024, 412 Knott Building

- Please enter the Knott Building at the North entrance as indicated below.
- Public parking is available at Kleman Plaza (entrance at West Jefferson Sreet/South Duval Street) and the R.A. Grey Building Garage (entrance at West St. Augustine Street/South Bronough Street).



**STATE OF FLORIDA
FLORIDA ELECTIONS COMMISSION**

In Re: Jacqueline Perez

Case No.: FEC 21-132

TO: Jacqueline Perez
17675 Boat Club Drive
Ft. Myers, FL 33908-4467

Cheryl Futch, Qualifying Officer
Lee County SOE's Office
2480 Thompson Street
Ft. Myers, FL 33901

**NOTICE OF CANCELLATION OF HEARING (PROBABLE CAUSE
DETERMINATION (PCD))**

You are hereby notified that **the previously scheduled hearing for May 14, 2024, is CANCELLED.** It is anticipated that your case will be scheduled for a new hearing date to be determined as soon as possible.

A Notice of Hearing will be mailed to you approximately 14 days prior to the new hearing date. You may also wish to monitor our website at <https://www.fec.state.fl.us/> for meeting announcements.

Tim Vaccaro
Executive Director
Florida Elections Commission
May 13, 2024



Florida Elections Commission

107 West Gaines Street, Suite 224 Tallahassee, Florida 32399-6596

Telephone: (850) 922-4539 · Facsimile: (850) 921-0783

FEC@myfloridalegal.com · www.fec.state.fl.us



May 2, 2024

Jacqueline Perez
17675 Boat Club Drive
Fort Myers, FL 33908-4467

RE: Case No.: FEC 21-132; Respondent: Jacqueline Perez

Dear Ms. Perez:

I wanted to introduce myself as the staff attorney assigned to present this matter at the upcoming Probable Cause Hearing before the Commission. This case is scheduled to be heard on Tuesday, May 14, 2024, in Tallahassee, FL. A Notice of Hearing will be arriving in the mail with further updates and instructions.

If you prefer to conclude your case through settlement rather than the scheduled hearing, I am happy to assist. Completion of settlement would occur upon our receipt of a signed agreement and valid payment, which I would guide you through. Settlement is optional, and no action is required if you wish to proceed to the scheduled hearing.

I have included a consent agreement for your consideration. You are welcome to contact me at my direct number, (850) 404-5612, or my email address, mattie.clay@myfloridalegal.com, if you have questions about the document. Settlement is intended to be collaborative, so I encourage your feedback.

Please notify me by email or telephone if you wish to proceed with settlement, and I will outline our remaining steps. We may also revisit settlement before the next stage of hearings following Probable Cause; however, a different agreement will be required at that time.

Please do not hesitate to contact our office if you have any questions or concerns.

Sincerely,

A handwritten signature in blue ink that reads "Mattie T. Clay". The signature is written in a cursive style with a large, stylized "M" and "C".

Mattie T. Clay
Assistant General Counsel

**STATE OF FLORIDA
FLORIDA ELECTIONS COMMISSION**

In Re: Jacqueline Perez

Case No.: FEC 21-132

TO: Jacqueline Perez
17675 Boat Club Drive
Ft. Myers, FL 33908-4467

Cheryl Futch, Qualifying Officer
Lee County SOE's Office
2480 Thompson Street
Ft. Myers, FL 33901

NOTICE OF HEARING (PROBABLE CAUSE DETERMINATION (PCD))

A hearing will be held in this case before the Florida Elections Commission on, **May 14, 2024 at 11:00 a.m., or as soon thereafter as the parties can be heard**, at the following location: **412 Knott Building, Pat Thomas Committee Room, 404 South Monroe Street, Tallahassee, Florida 32399.**

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Tim Vaccaro

Executive Director
Florida Elections Commission
April 26, 2024

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**STATE OF FLORIDA
FLORIDA ELECTIONS COMMISSION**

In Re: Jacqueline Perez

Case No.: FEC 21-132

STAFF RECOMMENDATION FOLLOWING INVESTIGATION

Pursuant to Section 106.25(4)(c), Florida Statutes, undersigned staff counsel files this written recommendation for disposition of the sworn complaint in this case recommending that there is **probable cause** to charge Respondent with violating **Section 106.07(5), Florida Statutes**, and **no probable cause** to charge Respondent with violating **Sections 106.19(1)(b), 106.19(1)(c), and 106.19(1)(d), Florida Statutes**. Based upon a thorough review of the Report of Investigation submitted on May 23, 2023, the following facts and law support this staff recommendation:

1. On February 15, 2021, the Florida Elections Commission (“Commission”) received a sworn complaint from Cheryl Futch, Qualifying Officer for the Lee County Supervisor of Elections, (“Complainant” or “Filing Officer”) alleging that Jacqueline Perez (“Respondent”) violated Chapter 106, Florida Statutes.

2. Respondent was a candidate for Lee County School Board, District 3, in the 2020 election. Respondent’s Statement of Candidate form (“DS-DE 84”) was filed on January 6, 2020. (ROI Exhibit 2, page 1)¹ Respondent was a first-time candidate and was defeated in the general election on November 3, 2020. (ROI Exhibit 7, page 4; Attachment A, page 1)

3. By letter dated June 16, 2021, the Executive Director notified Respondent that Commission staff would investigate the following statutory provisions:

Section 106.07(5), Florida Statutes: Respondent, a 2020 candidate for Lee County School Board, District 3, may have certified one or more campaign treasurer’s reports were true, correct, and complete when they were not, based upon an apparent deficit after the 2020 termination report was filed, as alleged in the complaint.

Section 106.19(1)(b), Florida Statutes: Respondent, a 2020 candidate for Lee County School Board, District 3, may have failed to report one or more contributions required to be reported by Chapter 106, Florida Statutes, based upon an apparent deficit after the 2020 termination report was filed, as alleged in the complaint.

Section 106.19(1)(c), Florida Statutes: Respondent, a 2020 candidate for Lee County School Board, District 3, may have falsely reported or deliberately failed to include information in one or more campaign treasurer’s reports required by Chapter 106, Florida

¹ The Report of Investigation is referred to herein as “ROI.”

Statutes, based upon an apparent deficit after the 2020 termination report was filed, as alleged in the complaint.

Section 106.19(1)(d), Florida Statutes: Respondent, a 2020 candidate for Lee County School Board, District 3, may have made or authorized one or more expenditures prohibited by Chapter 106, Florida Statutes, based upon an apparent deficit after the 2020 termination report was filed, as alleged in the complaint.

4. On January 6, 2020, Respondent filed the Appointment of Campaign Treasurer and Designation of Campaign Depository for Candidates form (“DS-DE 9”) appointing herself as treasurer for the campaign. (ROI Exhibit 1, page 1)

5. On January 7, 2020, the Filing Officer sent Respondent an email with the subject, “CFR Handbook and Access Link.” The email provided Respondent with a link and log-in credentials to the Supervisor of Elections’ Campaign Financial Reporting System (“CFRS”) as well as attachments containing the Calendar of Reporting Dates and CFR Guidebook. The email invited Respondent to contact the Qualifying Department with any questions or concerns. (ROI Exhibit 3, pages 1-2)

6. On January 7, 2020, the Filing Officer sent Respondent an email with the subject, “Active Candidate Acknowledgment.” The email advised Respondent that all candidates are required to file campaign treasurer’s reports by means of the CFRS. (ROI Exhibit 4, page 1) The email again provided Respondent with a link and log-in credentials to the CFRS and copies of the guidebook and calendar. (ROI Exhibit 4, pages 1-3) The email informed Respondent that all necessary publications were available on the Supervisor of Elections’ website. The email further advised that it was Respondent’s responsibility to read, understand, and follow the requirements of Florida’s election laws. (ROI Exhibit 4, page 2)

Alleged Violation: Sections 106.07(5), 106.19(1)(b), and 106.19(1)(d), Florida Statutes

7. Complainant alleged that Respondent violated Florida’s election laws by certifying that the campaign’s Termination Report (“20-TRG”) was true, correct, and complete when it was not. Specifically, Complainant alleged that Respondent omitted contributions and made or authorized prohibited expenditures, which caused the campaign account to reflect a deficit balance of \$2,574.52. (ROI Exhibit 6, pages 3-4; ROI Exhibit 7, page 4)

8. Respondent filed the 20-TRG Report on the designated due date of February 1, 2021, which covered from October 30, 2020, to February 1, 2021. (ROI Exhibit 9, page 1) Respondent disclosed no contributions and six expenditures totaling \$6,464.51. (ROI Exhibit 9, pages 2-3)

9. Respondent filed an amendment to the 20-TRG Report on March 10, 2021, wherein she added one in-kind contribution from herself totaling \$872.12, removed two expenditures to Facebook totaling \$872.12, and added three expenditures totaling \$204.73. (ROI Exhibit 9, pages 4-6)

10. Bank records confirmed all transactions except a \$500.00 refund to Respondent's spouse, which was not verified. (ROI Exhibit 8, pages 4, 6, 8 & 10; ROI Exhibit 9, page 3) Respondent's loan repayment of \$5,002.39 was accurate in terms of the account's final balancing; however, Respondent deposited \$5,000.00 from her personal checking account on February 2, 2021, the day after the reporting period ended, and returned the deposit with the loan repayment later that day, which totaled \$10,002.39 and zeroed out the account. (ROI Exhibit 8, page 10; ROI Exhibit 9, page 3)

11. The account maintained a surplus balance throughout the reporting period until the account was zeroed out on February 2, 2021. (ROI Exhibit 8, pages 4-10)

12. Respondent did not reply to the investigation. (ROI Exhibit 12, pages 1, 3 & 4) Prior to the complaint, Respondent informed the Supervisor of Elections' office that she was sick for several weeks. Respondent stated that she provided the majority of the campaign's funds. (ROI Exhibit 11, pages 1-2)

13. Respondent certified that the 20-TRG Report was true, correct, and complete when it was not. It does not appear that Respondent knowingly and willfully omitted a contribution as Respondent converted two expenditures to an in-kind contribution she funded. The amendment did not jeopardize transparency but provided further specificity as to the transaction's origin. It does not appear that Respondent made or authorized a prohibited expenditure as the account did not incur a deficit balance.

Alleged Violation: Section 106.19(1)(c), Florida Statutes

14. Regarding the Complainant's allegation that Respondent falsely reported or deliberately failed to include information required by Chapter 106, Florida Statutes, on the campaign's reports, insufficient evidence exists showing that Respondent's actions were knowing and deliberate. Respondent amended the 20-TRG Report approximately one month after it was filed, which substantially reflected the campaign's activities.

15. "Probable Cause" is defined as reasonable grounds of suspicion supported by circumstances sufficiently strong to warrant a cautious person in the belief that the person has committed the offense charged. *Schmitt v. State*, 590 So. 2d 404, 409 (Fla. 1991). Probable cause exists where the facts and circumstances, of which an [investigator] has reasonably trustworthy information, are sufficient in themselves for a reasonable man to reach the conclusion that an offense has been committed. *Department of Highway Safety and Motor Vehicles v. Favino*, 667 So. 2d 305, 309 (Fla. 1st DCA 1995).

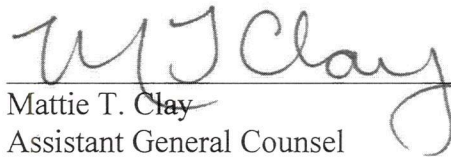
16. The facts set forth above show that Respondent was a 2020 candidate for Lee County School Board, District 3. Respondent certified that the campaign's 20-TRG Report was true, correct, and complete when it was not. It does not appear that Respondent omitted contributions, authorized prohibited expenditures, or concealed or falsified the campaign's financial activities.

Based upon these facts and circumstances, I recommend that the Commission find **no probable cause** to charge Respondent with violating **Sections 106.19(1)(b), 106.19(1)(c), and 106.19(1)(d), Florida Statutes**, and that the Commission find probable cause to charge Respondent with violating the following:

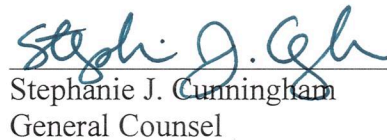
Count 1:

On February 1, 2021, Jacqueline Perez violated Section 106.07(5), Florida Statutes, when she certified that the campaign's 20-TRG Report was true, correct, and complete when it was not.

Respectfully submitted on January 23, 2024.


Mattie T. Clay
Assistant General Counsel

I reviewed this Staff Recommendation this 23rd day of January 2024.


Stephanie J. Cunningham
General Counsel

Jacqueline Perez ran for election to the [School District of Lee County school board](#) to represent [District 3](#) in Florida. Perez lost in the general election on [November 3, 2020](#).

Elections

2020

See also: [School District of Lee County, Florida, elections \(2020\)](#).

General election

General election for School District of Lee County school board District 3

Incumbent [Chris Patricca](#) defeated [Jacqueline Perez](#) in the general election for School District of Lee County school board District 3 on November 3, 2020.

	Candidate	%	Votes
✓ 	Chris Patricca (Nonpartisan)	55.1	38,058
	Jacqueline Perez (Nonpartisan)	44.9	31,064

BP Incumbents are **bolded and underlined**. The results have been certified. [Source](#) Total votes: 69,122
 C = candidate completed the Ballotpedia Candidate Connection [survey](#).

If you are a candidate and would like to tell readers and voters more about why they should vote for you, [complete the Ballotpedia Candidate Connection Survey](#).

Do you want a spreadsheet of this type of data? [Contact our sales team](#).

Nonpartisan primary election

Nonpartisan primary for School District of Lee County school board District 3

Incumbent [Chris Patricca](#) and [Jacqueline Perez](#) defeated [Brian DiGrazio](#) in the primary for School District of Lee County school board District 3 on August 18, 2020.

	Candidate	%	Votes
✓ 	Chris Patricca (Nonpartisan)	39.0	12,531
✓ 	Jacqueline Perez (Nonpartisan)	31.0	9,965
	Brian DiGrazio (Nonpartisan)	29.9	9,605

BP Incumbents are **bolded and underlined**. The results have been certified. [Source](#) Total votes: 32,101
 C = candidate completed the Ballotpedia Candidate Connection [survey](#).

If you are a candidate and would like to tell readers and voters more about why they should vote for you, [complete the Ballotpedia Candidate Connection Survey](#).

Do you want a spreadsheet of this type of data? [Contact our sales team](#).

FLORIDA ELECTIONS COMMISSION

Report of Investigation for Apparent Deficit in Campaign Account

Case Number: FEC 21-132

Section 106.19(1)(d), Florida Statutes, a candidate made or authorized one or more expenditure(s) prohibited by Chapter 106, F.S.

Sections 106.07(5), 106.19(1)(b), and 106.19(1)(c), Florida Statutes, a candidate certified campaign treasurer report as true, correct, and complete when they were not, failed to report contribution(s) required to be reported by Chapter 106, F.S., and falsely reported or deliberately failed to include all information required by Chapter 106, F.S., in a campaign treasurer report.

Respondent: Jacqueline Perez**Respondent's Atty:** N/A**Complainant:** Cheryl Futch, Qualifying Officer for Lee County Supervisor of Elections (SOE)**Complaint Filed:** February 15, 2021**Respondent Type:** Candidate**Additional Section:** None**I. Preliminary Information:**

1. Respondent was a 2020 candidate for Lee County School Board, District 3; she was defeated in the general election held on November 3, 2020. Respondent was a first-time candidate.

2. An Appointment of Campaign Treasurer and Designation of Campaign Depository (DS-DE 9) was filed with the SOE on January 6, 2020. Respondent was appointed as campaign treasurer. To review the DS-DE 9, refer to Exhibit 1.

3. Respondent filed a Statement of Candidate with the SOE on January 6, 2020, in which Respondent certified she had been provided access to read and understand the requirements of Chapter 106, F.S. To review the Statement of Candidate, refer to Exhibit 2.

4. On January 7, 2020, the SOE sent Respondent an email to the address provided on the DS-DE 9 with the subject, "CFR Handbook and Access Link." The email provided Respondent a link and log-in credentials to the SOE's Campaign Financial Reporting System (CFRS). The email invited Respondent to contact the SOE with any questions or concerns. To review the email, refer to Exhibit 3.

5. On January 7, 2020, the SOE sent Respondent an email to the address provided on the DS-DE 9 with the subject, "Active Candidate Acknowledgment." The email advised Respondent that all candidates are required to file campaign treasurer's reports by means of the CFRS. The email provided Respondent a link and log-in credentials to the CFRS. The email further informed Respondent that all necessary publications are available on the SOE's website. The email further advised that it was Respondent's responsibility to read, understand, and follow the requirements of Florida's election laws. To review the email, refer to Exhibit 4.

6. Prior to the deadline for the 2020 Termination Report (20-TRG), the SOE sent Respondent five reminder emails on the following dates: December 1, 2020, January 4, 2021, January 20, 2021, January 26, 2021, and February 1, 2021. To review the reminder emails, refer to Exhibit 5.

7. On February 2, 2021, the SOE sent Respondent notification via email and FedEx delivery to the email and mailing address provided on the DS-DE 9 that the 20-TRG was incomplete due to an apparent deficit after the 20-TRG was filed. The letter was confirmed delivered on February 3, 2021. To review the notifications, refer to Exhibit 6.

II. Alleged Violation of Section 106.19(1)(d), Florida Statutes:

8. I investigated whether Respondent violated this section of the election laws by making or authorizing one or more expenditures prohibited by Chapter 106, Florida Statutes.

9. The SOE's Candidate Report total showed an apparent deficit balance in the following reporting period: 20-TRG. To review the pertinent part of the report, refer to Exhibit 7, page 4.

10. I reviewed bank records from the designated campaign depository covering the following reporting periods: 20-TRG.¹ There was no instance during that timeframe in which the campaign account balance was negative. To review the bank records, refer to Exhibit 8.

III. Alleged Violation of Sections 106.07(5), 106.19(1)(b), and 106.19(1)(c), Florida Statutes:

11. I investigated whether Respondent violated these sections of the election laws by certifying that one or more campaign treasurer report(s) were true, correct, and complete when they were not, failing to report one or more contribution(s), and falsely reporting or deliberately failing to include information in one or campaign treasurer report(s) due to an apparent deficit balance in the following reporting period: 20-TRG.

12. I reviewed bank records from the designated campaign depository and compared them with campaign treasurer report(s) covering the following reporting periods: 20-TRG.² The results of my review are reflected in the table below. To review the bank records, refer to Exhibit 8. To review the campaign treasurer report, refer to Exhibit 9. To review Respondent's filing history, refer to Exhibit 10.

Comparison of Campaign Treasurer Report with Bank Records


Report & Dates Due/Filed	Reporting Period & Document Filed	Information on Report	Information from Bank
20-TRG 2/1/21 2/1/21	10/30/20 – 2/1/21 Report	\$767.81 expenditure to Facebook on 10/30/20 ³ \$500.00 expenditure ("refund") to Ricardo Perez on 10/30/20 Not Reported ⁴	No Record Found No Record Found \$45.00 expenditure to Constant Contact on 11/10/20

¹ I subpoenaed campaign account records from the designated campaign depository.

² The review was reflective of original reports filed and applicable bank records of deposits, debits, bank fees, and checks drawn on the campaign account, but it did not reflect activity associated with online contribution platforms where the investigation was unable to obtain records itemizing the sources of such contributions. If a listed report is not included in the table, my review determined that all applicable transactions were reported.

³ This expenditure was deleted on an amended 20-TRG filed on 3/10/21.

⁴ This expenditure was added to an amended 20-TRG filed on 3/10/21.

		<p>\$104.31 expenditure to Facebook on 11/30/20⁵</p> <p>Not Reported⁶</p> <p>Not Reported⁷</p> <p>\$5,002.39 expenditure (“repayment loan”) to Respondent on 1/31/21</p>	<p>No Record Found</p> <p>\$14.99 expenditure to Zoom on 11/10/20</p> <p>\$144.74 expenditure to Google on 11/16/20</p> <p>\$10,002.39 expenditure via electronic transfer to Respondent’s personal checking account on 2/2/21⁸</p>
<p>13. Respondent did not respond to the complaint. However, in an email conversation with the SOE in early February of 2021, Respondent discussed the 20-TRG. The SOE informed Respondent, “You are over in your expenditures.” In reply on February 9, 2021, Respondent stated, “I have been so sick for the past few weeks and just starting to feel better. I beg for another day I will have to give this to my accountant to correct if I cannot figure it out. I will work on it all night and see if I can find any errors. The majority of the funds have been from my own funds. Could it be the in kind? I know I have not done anything illegal and never would.” To review the email conversation, refer to Exhibit 11.</p>			
<p>14. I attempted to contact Respondent on four occasions for the purpose of providing an opportunity to discuss the allegations made in the complaint. As of the date of this report, neither my telephone calls nor emails have been returned. Therefore, I am unable to ascertain whether she has read Chapter 106, Florida Statutes, and/or the <i>Candidate and Campaign Treasurer Handbook</i>. To review the phone log and emails, refer to Exhibit 12.</p>			
SIGNATURE OF INVESTIGATOR:			Date: May 23, 2023

⁵ This expenditure was deleted on an amended 20-TRG filed on 3/10/21. Respondent added an in-kind contribution from herself on 10/30/20 valued at \$872.12 for “online ads” in the amended report; the reported value of the in-kind contribution equals the reported value of the two deleted expenditures to Facebook referenced in this table.

⁶ This expenditure was added to an amended 20-TRG filed on 3/10/21.

⁷ This expenditure was added to an amended 20-TRG filed on 3/10/21.

⁸ This expenditure occurred the day after the 20-TRG reporting period ended. Earlier that same day, \$5,000.00 had been transferred into the campaign account from Respondent’s personal checking account.

FLORIDA ELECTIONS COMMISSION
REPORT OF INVESTIGATION
Jacqueline Perez -- FEC 21-132

LIST OF EXHIBITS	
Exhibits #s	Description of Exhibits
Exhibit 1	DS-DE 9
Exhibit 2	DS-DE 84
Exhibit 3	CFR Handbook and Access Link Email
Exhibit 4	Active Candidate Acknowledgment Email
Exhibit 5	20-TRG Reminder Emails
Exhibit 6	Failure to File Email & FedEx Letter
Exhibit 7	Candidate Report totals
Exhibit 8	Bank Records
Exhibit 9	20-TRG & Amended 20-TRG
Exhibit 10	Filing History
Exhibit 11	Email Conversation – Respondent & SOE
Exhibit 12	Phone Log & Emails to Respondent

**APPOINTMENT OF CAMPAIGN TREASURER
AND DESIGNATION OF CAMPAIGN
DEPOSITORY FOR CANDIDATES**

(Section 106.021(1), F.S.)

(PLEASE PRINT OR TYPE)

20JAN06PM0436 SDE Lee Co F1

NOTE: This form must be on file with the qualifying officer before opening the campaign account.

OFFICE USE ONLY

1. CHECK APPROPRIATE BOX(ES):

☒ Initial Filing of Form Re-filing to Change: ☐ Treasurer/Deputy ☐ Depository ☐ Office ☐ Party

2. Name of Candidate (In this order: First, Middle, Last)

Jacqueline Perez

3. Address (include post office box or street, city, state, zip code)

17675 Boat Club Dr
Fort Myers Florida 33908

4. Telephone

(239) 878-2200

5. E-mail address

intmarco9@yahoo.com

6. Office sought (include district, circuit, group number)

School Board District 3 Lee County.

7. If a candidate for a nonpartisan office, check if applicable:

☐ My intent is to run as a Write-In candidate.

8. If a candidate for a partisan office, check block and fill in name of party as applicable: My intent is to run as a

☐ Write-In ☐ No Party Affiliation ☐ _____ Party candidate.

9. I have appointed the following person to act as my ☒ Campaign Treasurer ☐ Deputy Treasurer

10. Name of Treasurer or Deputy Treasurer

Jacqueline Perez

11. Mailing Address

17675 Boat Club Dr

12. Telephone

(239) 878-2200

13. City

Fort Myers

14. County

Lee

15. State

FL

16. Zip Code

33908

17. E-mail address

intmarco9@yahoo.com

18. I have designated the following bank as my ☒ Primary Depository ☐ Secondary Depository

19. Name of Bank

Regions Bank

20. Address

11881 Palm Beach Blvd.

21. City

Fort Myers

22. County

Lee

23. State

FL.

24. Zip Code

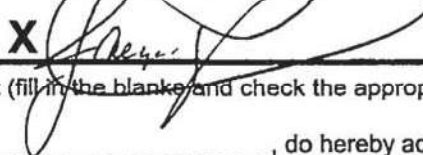
33905

UNDER PENALTIES OF PERJURY, I DECLARE THAT I HAVE READ THE FOREGOING FORM FOR APPOINTMENT OF CAMPAIGN TREASURER AND DESIGNATION OF CAMPAIGN DEPOSITORY AND THAT THE FACTS STATED IN IT ARE TRUE.

25. Date

01/06/2020

26. Signature of Candidate

☒ 

27. Treasurer's Acceptance of Appointment (fill in the blanks and check the appropriate block)

I, Jacqueline Perez, do hereby accept the appointment
(Please Print or Type Name)

designated above as: ☒ Campaign Treasurer ☐ Deputy Treasurer.

01/06/2020

Date

☒


Signature of Campaign Treasurer or Deputy Treasurer

STATEMENT OF CANDIDATE

(Section 106.023, F.S.)

(Please print or type)

OFFICE USE ONLY

20JAN06PM0436 50E Lee Co F1

I, Jacqueline Perez,
candidate for the office of Lee County School Board District 3;

have been provided access to read and understand the requirements of
Chapter 106, Florida Statutes.

X 
Signature of Candidate

01/6/2020
Date

Each candidate must file a statement with the qualifying officer within 10 days after the Appointment of Campaign Treasurer and Designation of Campaign Depository is filed. Willful failure to file this form is a first degree misdemeanor and a civil violation of the Campaign Financing Act which may result in a fine of up to \$1,000, (ss. 106.19(1)(c), 106.265(1), Florida Statutes).



Cheryl Futch <cfutch@lee.vote>

CFR HANDBOOK AND ACCESS LINK (JACQUELINE PEREZ)

1 message

Cheryl Futch <cfutch@lee.vote>
 To: intmarco9@yahoo.com
 Cc: TAMMY LIPA <tlipa@lee.vote>

Tue, Jan 7, 2020 at 8:49 AM

IMPORTANT NOTICE

PLEASE RESPOND THAT YOU HAVE REVIEWED THIS COMMUNICATION AND ATTACHMENTS

To:
 Mrs. Jacqueline Perez
 17675 Boat Club Dr
 Fort Myers, FL 33908

Campaign Account/Office:
 School Board 3

This communication contains two (2) attachments pertaining to the [Campaign Financial Reporting \(CFR\) System](#) used in Lee County. The [CFR System](#) link appears below. You can click on the link to access the [CFR System](#) or copy and paste the link into your web browser in order to access the system.

Upon accessing the [CFR System](#) site, be sure to add the site to your Favorites file and place the site on your Favorites Bar for easy upload and access.

A USER ID and Password are required to log in to the system. Two (2) PIN numbers are required in order to submit a campaign finance report.

Additional candidate and committee resources are also available at www.lee.vote or visit the Florida Division of Elections <http://dos.myflorida.com/elections/>.

First Report Due:	2/10/2020 before Midnight (11:59 p.m.) EST	
User ID:	1562	Cannot be changed
Password:	UFkDxx6v	You will be required to change your password after the initial log in.
Candidate or Chair PIN #1:	7822	PIN may be changed.
Treasurer / Deputy Treasurer PIN #2:	7822	PIN may be changed.
<u>CFR System Link:</u>	https://www.voterfocus.com/ws/wscand/candidate_login.php?county=lee	

A late report will be assessed an automatic fine pursuant to Section 106.07 or 106.29 Florida Statutes. The Supervisor of Elections cannot waive a fine on a late campaign finance report. Filing a waiver late will still be subject to fines. The report is LEGALLY FILED when it is PINNED with two PINs and electronically submitted. Submit the report any time before Midnight, 11:59 p.m., EST-Eastern Standard Time of the report's due date.

Do not hesitate to contact the Qualifying Department if you have questions or concerns.

Cheryl Futch, Qualifying Officer	239-533-6311	cfutch@lee.vote
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Tammy Lipa, Administration Support Specialist	239-533-6329	tlipa@lee.vote
Bernie Feliciano, Chief Deputy, Administration	239-533-6304	bfeliciano@lee.vote

Cheryl Futch

Qualifying Officer

Lee County Supervisor of Elections

PO Box 2545

Ft Myers FL 33902

Main Number: 239-533-8683

Direct Number: 239-533-6311

Fax Number: 239-533-6310

cfutch@lee.vote

Visit our website: www.lee.vote

Under Florida law, email addresses are public records. If you do not want your email address released in response to a public-records request, do not send electronic mail to this entity. Instead, contact this office by phone or in writing.

2 attachments



2015 CFR Guidebook.pdf
4773K



2020 Reporting Calendar_CAND_091219.pdf
117K



Cheryl Futch <cfutch@lee.vote>

ACTIVE CANDIDATE ACKNOWLEDGEMENT (JACQUILINE PEREZ)

1 message

Cheryl Futch <cfutch@lee.vote>
 To: intmarco9@yahoo.com
 Cc: TAMMY LIPA <tlipa@lee.vote>

Tue, Jan 7, 2020 at 8:55 AM

**TOMMY DOYLE
 SUPERVISOR OF ELECTIONS
 LEE COUNTY, FLORIDA**

<u>PHYSICAL ADDRESS</u> Melvin Morgan Constitutional Complex 2480 Thompson Street, 3 rd Floor Fort Myers FL 33901	<u>MAILING ADDRESS</u> please send all correspondence to this address P O Box 2545 Fort Myers FL 33902-2545
(239) LEE-VOTE (533-8683) www.lee.vote	Fax (239) 533-6310

ACTIVE CANDIDATE ACKNOWLEDGEMENT

Date	January 7, 2020				
Candidate Name	JACQUELINE PEREZ				
Mailing Address	17675 BOAT CLUB DR				
Office Sought	SCHOOL BOARD 3				
City, State, Zip Code	FORT MYERS		FL		33908
DS-DE 9 Placed on File	01/06/2020				
Campaign Treasurer	JACQUELINE PEREZ		Deputy Treasurer		
Additional Deputy Treasurers					
First Report Due	2/10/2020	Report Type	20M1	Period Covered	1/1/2020-1/31/2020

This will acknowledge receipt of your Appointment of Campaign Treasurer and Designation of Campaign Depository. Your name has been placed on the 2018 active candidate list.

Campaign Treasurer's Reports

Indicated above, is the date your first campaign treasurer's report is due, the report type and the period covered by the report. All candidates who file reports with the Lee County Supervisor of Elections is required to file by means of the Campaign Financial Reporting System, herein referred to as (CFRS).

CFRS Log-in, Credentials and Personal Identification Numbers (PINs)

Below is the web address to access the CFRS. You will also receive this information by email. Once you have logged in using the initial password, you will be immediately prompted to change it to a confidential sign-on. You, your campaign treasurer and deputy

treasurers are responsible for protecting this password and PINS from disclosure and are responsible for all filings using these confidential credentials, unless the Supervisor of Elections Office is notified that your credentials have been compromised.

CFRS Website Address	https://www.voterfocus.com/CampaignFinance/candidate_login.php?county=lee			
User Identification Number	1562	Password	UFkDxx6v	
Personal Identification Numbers (PINs)	PIN #1	7822	PIN #2	7822

**Please continue to review important information about:
Timely Filing, Electronic Receipts, Instructions and Assistance, and Responsibility.**

Timely Filing

All reports and waivers filed must be completed and filed through the CFRS before midnight (11:59 p.m.) of the due date. Reports not filed by before midnight (11:59 p.m.) of the due date are late-filed and subject to the penalties in Section 106.07(8), Florida Statutes. In the event that the CFRS is inoperable on the due date, the report will be accepted as timely filed if filed before midnight (11:59 p.m.) of the first business day the CFRS becomes operable. No fine will be levied during the period the CFRS was inoperable.

Any candidate failing to file a report on the designated due date shall be subject to a fine of \$50 per day for the first 3 days late and, thereafter, \$500 per day for each late day, not to exceed 25% of the total receipts or expenditures, whichever is greater, for the period covered by the late report. However, for reports immediately preceding each primary and general election, the fine shall be \$500 per day for each late day, not to exceed 25% of the total receipts or expenditures, whichever is greater, for the period covered by the late report. Waivers do not constitute a report therefore if filed late it will be reported to the Florida Election Commission who will impose their own penalties.

Electronic Receipts

The person submitting the report on the CFRS will be issued an electronic receipt indicating and verifying a report or waiver was filed. Each campaign treasurer's report filed by means of the CFRS is considered to be under oath by the candidate and campaign treasurer and such persons are subject to the provisions of Section 106.07(5), Florida Statutes. Additionally, each candidate, campaign treasurer, deputy treasurer, committee chairman, organizational officer, principal officer, or individual receiving CFRS login, credentials and PINs will be required to submit a CFRS Affidavit with the Lee County Supervisor of Elections.

Instructions, Assistance, Responsibility

You will receive, by email, a CFRS instruction guide to assist with navigation, data entry, and submission of reports. The Lee County Supervisor of Elections, Qualifying Department also provides support for all CFRS users. Contact the Qualifying Department, if you require assistance.

All necessary publications are available on the Lee County Supervisor of Elections website at <https://www.lee.vote>.

It is your responsibility to read, understand, and follow the requirements of Florida's election laws. Therefore, please access at <https://www.lee.vote>, the Candidates tab, select the Candidate Online Packet for the office sought and print a copy of the following documents: Chapters 104 and 106, Florida Statutes, *Candidate and Campaign Treasurer Handbook*, *Calendar of Reporting Dates*, and *The Election Laws of the State of Florida*.

Do not hesitate to contact us if you need additional information.

Qualifying Officer	Cheryl Futch	Direct	239-533-6311	Email	cfutch@lee.vote
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Administration Specialist	Support	Tammy Lipa	Direct	239-533-6329	Email	tlipa@lee.vote
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Cheryl Futch

Qualifying Officer

Lee County Supervisor of Elections

PO Box 2545

Ft Myers FL 33902

Main Number: 239-533-8683

Direct Number: 239-533-6311

Fax Number: 239-533-6310

cfutch@lee.vote

Visit our website: www.lee.vote

Under Florida law, email addresses are public records. If you do not want your email address released in response to a public-records request, do not send electronic mail to this entity. Instead, contact this office by phone or in writing.

2 attachments



2015 CFR Guidebook.pdf

4773K



2020 Reporting Calendar_CAND_091219.pdf

117K



Cheryl Futch <cfutch@lee.vote>

Campaign Treasurer's Termination Report Due [02/01/2021] [20-TRG] [CANDIDATE]

1 message

Lee County Qualifying Department <leeffms@lee.vote>
To: JACQUELINE PEREZ <intmarco9@yahoo.com>

Tue, Dec 1, 2020 at 11:06 AM

Campaign Treasurer's Termination Report Due [02/01/2021] [20-TRG] [CANDIDATE]

This is a reminder that the 20-TRG Campaign Treasurer's Termination report is due on 02/01/2021.
Please see the attached documents for important information.

Do not reply to this email.

2 attachments **Termination Report Due [02-01-21] [20-TRG] [CANDIDATE].pdf**
427K **2020 Reporting Calendar_CAND_091219.pdf**
117K

Please respond that you have reviewed this communication

The absence of a reminder notice does not release the candidate or campaign treasurer from his/her obligation to timely file the required campaign termination report.

Due Date	Reporting Period Covered	Report Type Code
02/01/21	10/30/20 through 02/01/21	20-TRG

User ID, password and PIN #s required. Submit the report **BEFORE** (Midnight) 11:59 p.m. Eastern Standard Time of the report's due date. Access the Campaign Financial Reporting System by logging on:

https://www.voterfocus.com/ws/wscand/candidate_login.php?county=lee .

A LATE REPORT WILL BE ASSESSED A FINE—FILE ON TIME!

Do not hesitate to contact the Qualifying Department if you have questions or concerns.

Cheryl Futch, Qualifying Officer	239-533-6311	cfutch@lee.vote
Tammy Lipa, Administration Support Specialist	239-533-6329	tlipa@lee.vote
Bernie Feliciano, Chief Deputy, Administration	239-533-6304	bfeliciano@lee.vote

Cheryl Futch
Qualifying Officer
Post Office Box 2545
Fort Myers, FL 33902-2545

Main Number: 239-533-8683
Direct Number: 239-533-6329

tlipa@lee.vote

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2020 CANDIDATE REPORTING SCHEDULE

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Cheryl Futch <cfutch@lee.vote>

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1 message

Lee County Qualifying Department <leeffms@lee.vote>
To: JACQUELINE PEREZ <intmarco9@yahoo.com>

Mon, Jan 4, 2021 at 8:58 AM

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1 message

Lee County Qualifying Department <leeffms@lee.vote>
To: JACQUELINE PEREZ <intmarco9@yahoo.com>

Wed, Jan 20, 2021 at 9:01 AM

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To: JACQUELINE PEREZ <intmarco9@yahoo.com>

Tue, Jan 26, 2021 at 8:33 AM

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IF YOU ARE RECEIVING THIS EMAIL WE HAVE EITHER NOT RECEIVED YOUR REPORT OR IT HAS BEEN
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Due Date	Reporting Period Covered	Report Type Code
02/01/21	10/30/20 through 02/01/21	20-TRG

User ID, password and PIN #s required. Submit the report **BEFORE** (Midnight) 11:59 p.m. Eastern Standard Time of the report's due date. Access the Campaign Financial Reporting System by logging on:

https://www.voterfocus.com/ws/wscand/candidate_login.php?county=lee .

A LATE REPORT WILL BE ASSESSED A FINE—FILE ON TIME!

Do not hesitate to contact the Qualifying Department if you have questions or concerns.

Cheryl Futch, Qualifying Officer	239-533-6311	cfutch@lee.vote
Tammy Lipa, Administration Support Specialist	239-533-6329	tlipa@lee.vote
Bernie Feliciano, Chief Deputy, Administration	239-533-6304	bfeliciano@lee.vote

Cheryl Futch
Qualifying Officer
Post Office Box 2545
Fort Myers, FL 33902-2545

Main Number: 239-533-8683
Direct Number: 239-533-6329

tlipa@lee.vote

Visit our website: www.lee.vote

Under Florida law, email addresses are public records. If you do not want your email address released in response to a public-records request, do not send electronic email to this entity. Instead, contact this office by phone or in writing.



Cheryl Futch <cfutch@lee.vote>

Re: Report Submitted: JACQUELINE PEREZ - SCHOOL BOARD-3 (2021-02-01)

1 message

Cheryl Futch <cfutch@lee.vote>

Tue, Feb 2, 2021 at 8:54 AM

To: Jacqueline Perez <jacquelineschooldistrict3@gmail.com>, JACQUELINE PEREZ <intmarco9@yahoo.com>

Cc: TAMMY LIPA <tlipa@lee.vote>

Hello Jacqueline,

Please see the attached letter in reference to your Incomplete Report.

I have also attached the

If you have any questions or concerns please let me know.

Yours truly,

Cheryl Futch

Qualifying Officer

Lee County Supervisor of Elections

PO Box 2545

Ft Myers FL 33902

Main Number: 239-533-8683

Direct Number: 239-533-6311

Fax Number: 239-533-6310

cfutch@lee.vote

Visit our website: www.lee.vote

Under Florida law, email addresses are public records. If you do not want your email address

released in response to a public-records request, do not send electronic mail to this entity.

Instead, contact this office by phone or in writing.

On Mon, Feb 1, 2021 at 10:25 PM Candidate Financial <CFinance@vrsystems.com> wrote:

Note: This is an Automated Email from the Campaign Finance System. This email is sent from an email address that is not monitored -- If you wish to communicate with the reporting entity, please "Forward" this email to the reporter's email address. Using a "Reply To" message will not reach them.

JACQUELINE PEREZ - (lee) Candidate for SCHOOL BOARD-3 has submitted a financial report (2021-02-01 - Confirmation #1243130). Click here to log in : https://www.voterfocus.com/CampaignFinance/cf_cpanel.php

2 attachments

 **jacqueline perez_ TRG Incomplete Report Notice_020221.pdf**
437K

 **2020 CFR Guidebook.pdf**
4882K

**TOMMY DOYLE
SUPERVISOR OF ELECTIONS
LEE COUNTY—FLORIDA**

<u>PHYSICAL ADDRESS</u> LEE COUNTY CONSTITUTIONAL COMPLEX 2480 THOMPSON STREET 3 RD FLOOR FORT MYERS FL 33901	<u>MAILING ADDRESS</u> please send all correspondence to this address P O BOX 2545 FORT MYERS FL 33902-2545
MAIN OFFICE 239 LEE VOTE or 239-533-8683	FAX 239-533-6310 WEBSITE www.lee.vote

NOTIFICATION OF INCOMPLETE REPORT FILING

TO : Jacqueline Perez, Candidate 17675 Boat Club Dr., Fort Myers, FL 33908
Lee County School Board District 3

FROM : Cheryl Futch, Qualifying Officer

DATE : February 2, 2021

RE : 20-TRG, Campaign Treasurer's Report
DUE: February 1, 2021

The Lee County Supervisor of Elections office has determined that one or more campaign reports are incomplete for the reasons noted in the attached error report.

Your campaign is out of balance \$2,574.52

JACQUELINE PEREZ (NON)	(Active- DEFEATED)	\$48,472.07	\$1,549.73	\$51,046.59
-------------------------------	--------------------------------	-------------	------------	-------------

Pursuant to Section 106.07 (2), Florida Statutes, you have 7 days from the receipt of this notice to file an amended report to correct errors or provide missing information. If the information has been reported accurately, provide a written explanation to the Supervisor of Elections office addressing the issue noted in the error report. Please be advised that failure to supply this information within the time allowed may constitute a violation of Chapter 106, Florida Statutes.

If you have any questions, do not hesitate to contact me at 239-533-6311 or email cfutch@lee.vote.

Attachment

**TOMMY DOYLE
SUPERVISOR OF ELECTIONS
LEE COUNTY—FLORIDA**

<u>PHYSICAL ADDRESS</u> LEE COUNTY CONSTITUTIONAL COMPLEX 2480 THOMPSON STREET 3RD FLOOR FORT MYERS FL 33901	<u>MAILING ADDRESS</u> please send all correspondence to this address P O BOX 2545 FORT MYERS FL 33902-2545
MAIN OFFICE 239 LEE VOTE or 239-533-8683	FAX 239-533-6310 WEBSITE www.lee.vote

NOTIFICATION OF INCOMPLETE REPORT FILING

TO : Jacqueline Perez, Candidate 17675 Boat Club Dr., Fort Myers, FL 33908
Lee County School Board District 3

FROM : Cheryl Futch, Qualifying Officer

DATE : February 2, 2021

RE : 20-TRG, Campaign Treasurer's Report
DUE: February 1, 2021

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If you have any questions, do not hesitate to contact me at 239-533-6311 or email cfutch@lee.vote.

Attachment



February 03, 2021

Dear Customer,

The following is the proof-of-delivery for tracking number: 809522761774

Delivery Information:

Status:	Delivered	Delivered To:	Residence
Signed for by:	Signature not required	Delivery Location:	
Service type:	FedEx Standard Overnight		
Special Handling:	Deliver Weekday; Residential Delivery		FL,
		Delivery date:	Feb 3, 2021 15:32

Shipping Information:

Tracking number:	809522761774	Ship Date:	Feb 2, 2021
		Weight:	
Recipient:		Shipper:	
FL, US,		F M, US,	

Proof-of-delivery details appear below; however, no signature is available for this FedEx Express shipment because a signature was not required.

Thank you for choosing FedEx



Cheryl Futch <cfutch@lee.vote>

FedEx Shipment 809522761774: Your package has been delivered

1 message

TrackingUpdates@fedex.com <TrackingUpdates@fedex.com>

Wed, Feb 3, 2021 at 3:32 PM

Reply-To: trackingmail@fedex.com

To: cfutch@lee.vote



Hi. Your package was
delivered Wed, 02/03/2021 at
3:32pm.

**OBTAIN PROOF OF DELIVERY**

TRACKING NUMBER	809522761774
FROM	F M, US
TO	, FL, US
SHIP DATE	Tue 2/02/2021 06:52 PM
DELIVERED TO	Residence

Select Language ▼

Powered by Google Translate

REPORTING GROUP (ELECTION/COMMITTEES)

2020 CANDIDATES (11/3/2020)

Current reporting group (Election/Committees):

2020 CANDIDATES (11/3/2020) ▼

Go

(You can select another available reporting group from the above list.)

This web site lists candidates for county and local offices and committees/PACs.
Candidates for federal, state and multi-county offices are reported on the [Division of Elections of the Department of State Website](#).

Information contained within the reports has been generated by and is the sole responsibility of the reporting entity

NOTE: Each financial reporter row below can be "clicked" to see more details.

Candidates**Office: CLERK OF THE CIRCUIT COURT**

LINDA DOGGETT (REP) (<i>INACTIVE-ELECTED</i>)	Contributions	\$35,035.00
	In-Kind	\$0.00
	Expenditures	\$35,035.00

Office: PROPERTY APPRAISER

MATT CALDWELL (REP) (<i>INACTIVE-ELECTED</i>)	Contributions	\$49,977.00
	In-Kind	\$0.00
	Expenditures	\$49,977.00

ELAINA COSENTINO (WRI) (<i>INACTIVE-DEFEATED</i>)	Contributions	\$0.00
	In-Kind	\$0.00
	Expenditures	\$0.00

STEPHEN ALLEN CUNNINGHAM (REP) (<i>INACTIVE-WITHDRAWN</i>)	Contributions	\$0.00
	In-Kind	\$0.00
	Expenditures	\$0.00

MATT MILLER (REP) (<i>INACTIVE-DEFEATED</i>)	Contributions	\$20,000.00
	In-Kind	\$200.00
	Expenditures	\$20,000.00

Office: SHERIFF

Contributions	\$107,951.40
---------------	--------------

JAMES A LEAVENS (REP)	(INACTIVE- DEFEATED)	In-Kind	\$5,604.35
		Expenditures	\$107,951.40
CARMINE MARCENO (REP)	(INACTIVE- ELECTED)	Contributions	\$602,550.39
		In-Kind	\$17,680.61
		Expenditures	\$602,550.39
CARMEN MCKINNEY (NPA)	(INACTIVE- DEFEATED)	Contributions	\$11,170.00
		In-Kind	\$0.00
		Expenditures	\$11,170.00
ROBERT M NEELD (DEM)	(INACTIVE- DEFEATED)	Contributions	\$10,300.00
		In-Kind	\$0.00
		Expenditures	\$10,300.00
MICHAEL "COACH RAY" QUALLS (NPA)	(INACTIVE- DEFEATED)	Contributions	\$28,477.60
		In-Kind	\$176.25
		Expenditures	\$28,477.60

Office: SUPERVISOR OF ELECTIONS

TOMMY DOYLE (REP)	(INACTIVE- ELECTED)	Contributions	\$10,000.00
		In-Kind	\$0.00
		Expenditures	\$10,000.00

Office: TAX COLLECTOR

NOELLE BRANNING (REP)	(INACTIVE- ELECTED)	Contributions	\$13,600.00
		In-Kind	\$218.33
		Expenditures	\$13,600.00

Office: COUNTY COMMISSIONER-1

MICHAEL J DREIKORN (REP)	(INACTIVE- DEFEATED)	Contributions	\$47,473.28
		In-Kind	\$4,167.00
		Expenditures	\$47,473.28
KELSEY HOTCHKISS (WRI)	(INACTIVE- DEFEATED)	Contributions	\$0.00
		In-Kind	\$0.00
		Expenditures	\$0.00
KEVIN RUANE (REP)	(INACTIVE- ELECTED)	Contributions	\$354,404.00
		In-Kind	\$4,200.00
		Expenditures	\$354,404.00

Office: COUNTY COMMISSIONER-3

NICHOLAS "NICK" BATOS (REP)	(INACTIVE- DEFEATED)	Contributions	\$85,474.96
		In-Kind	\$9,157.15
		Expenditures	\$85,474.96
MOLLY HANNIGAN (WRI)	(INACTIVE- WITHDRAWN)	Contributions	\$0.00
		In-Kind	\$0.00
		Expenditures	\$0.00
PAULA R KIKER (REP)	(INACTIVE- WITHDRAWN)	Contributions	\$44,960.00
		In-Kind	\$0.00

		Expenditures	\$44,960.00
RAY SANDELLI (REP)	(INACTIVE-ELECTED)	Contributions	\$171,046.00
		In-Kind	\$3,915.56
		Expenditures	\$171,046.00
TODD JAMES TRUAX (DEM)	(INACTIVE-DEFEATED)	Contributions	\$59,095.00
		In-Kind	\$0.00
		Expenditures	\$59,095.00

Office: COUNTY COMMISSIONER-5

JUAN A GONZALEZ (DEM)	(INACTIVE-DEFEATED)	Contributions	\$9,946.82
		In-Kind	\$812.47
		Expenditures	\$9,946.82
STEVEN PATRICK HAAS (REP)	(INACTIVE-DEFEATED)	Contributions	\$6,350.00
		In-Kind	\$0.00
		Expenditures	\$6,350.00
FRANK MANN (REP)	(INACTIVE-ELECTED)	Contributions	\$69,765.00
		In-Kind	\$0.00
		Expenditures	\$69,765.00
KAYLEY MCHUGH (WRI)	(INACTIVE-WITHDRAWN)	Contributions	\$0.00
		In-Kind	\$0.00
		Expenditures	\$0.00

Office: COUNTY COURT JUDGE-GRP 5

HOWARD ANDREW SWETT (NON)	(INACTIVE-ELECTED)	Contributions	\$13,050.00
		In-Kind	\$100.00
		Expenditures	\$13,050.00

Office: COUNTY COURT JUDGE-GRP 6

JOSEPHINE M GAGLIARDI (NON)	(INACTIVE-ELECTED)	Contributions	\$6,500.00
		In-Kind	\$0.00
		Expenditures	\$6,500.00

Office: SCHOOL BOARD-2

EMORY CAVIN (NON)	(INACTIVE-DEFEATED)	Contributions	\$1,850.00
		In-Kind	\$0.00
		Expenditures	\$1,850.00
CHARLA FOX (NON)	(INACTIVE-DEFEATED)	Contributions	\$13,470.00
		In-Kind	\$0.00
		Expenditures	\$13,470.00
MELISA W GIOVANNELLI (NON)	(INACTIVE-ELECTED)	Contributions	\$58,425.00
		In-Kind	\$1,075.33
		Expenditures	\$58,425.00
JOHN F "JEFF" MCCULLERS (NON)	(INACTIVE-DEFEATED)	Contributions	\$18,390.00
		In-Kind	\$125.00
		Expenditures	\$18,390.00

Office: SCHOOL BOARD-3

BRIAN DIGRAZIO (NON)	(INACTIVE- DEFEATED)	Contributions	\$14,207.95
		In-Kind	\$10.00
		Expenditures	\$14,207.95
CHRIS PATRICCA (NON)	(INACTIVE- ELECTED)	Contributions	\$70,906.86
		In-Kind	\$1,251.28
		Expenditures	\$70,906.86
JACQUELINE PEREZ (NON)	(Active-DEFEATED)	Contributions	\$48,472.07
		In-Kind	\$1,549.73
		Expenditures	\$51,046.59

Office: SCHOOL BOARD-7 AT LARGE

GEORGE PETER BOHATCH (NON)	(INACTIVE- WITHDRAWN)	Contributions	\$0.00
		In-Kind	\$0.00
		Expenditures	\$0.00
PETE BOHATCH (NON)	(INACTIVE- DEFEATED)	Contributions	\$6,330.00
		In-Kind	\$333.08
		Expenditures	\$6,330.00
LISANDRA COLON (NON)	(INACTIVE- WITHDRAWN)	Contributions	\$301.00
		In-Kind	\$142.82
		Expenditures	\$301.00
CATHLEEN MORGAN (NON)	(INACTIVE- ELECTED)	Contributions	\$15,775.00
		In-Kind	\$626.77
		Expenditures	\$15,775.00
MELISSA J PANNETON (NON)	(INACTIVE- WITHDRAWN)	Contributions	\$0.00
		In-Kind	\$10.65
		Expenditures	\$0.00
CURT SHEARD (NON)	(INACTIVE- DEFEATED)	Contributions	\$5,695.77
		In-Kind	\$0.00
		Expenditures	\$5,695.77

Office: LEE MEMORIAL HEALTH SYSTEM-1

STEVE BROWN (NON)	(INACTIVE- ELECTED)	Contributions	\$0.00
		In-Kind	\$0.00
		Expenditures	\$0.00
THERESE EVERLY (NON)	(INACTIVE- ELECTED)	Contributions	\$2,350.00
		In-Kind	\$0.00
		Expenditures	\$2,350.00
CAROL ANN TURIELLO (NON)	(INACTIVE- DEFEATED)	Contributions	\$0.00
		In-Kind	\$0.00
		Expenditures	\$0.00

Office: LEE MEMORIAL HEALTH SYSTEM-3

SANDY COHEN (NON)		Contributions	\$20,266.04
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Regions Bank
Verandah Office
11881 Palm Beach Blvd
Ft Myers, FL 33905

JACQUELINE PEREZ FOR SCHOOL BOARD
17675 BOAT CLUB DR
FORT MYERS FL 33908-4467

1

ACCOUNT

Cycle 092
Enclosures 26
Page 0
1 of 3

LIFEGREEN NOT FOR PROFIT CHECKING

October 1, 2020 through October 30, 2020

SUMMARY

Beginning Balance	\$9,214.11	Minimum Daily Balance	\$847
Deposits & Credits	\$12,077.68 +	Average Monthly Statement Balance	\$3,645
Withdrawals	\$544.59 -		
Fees	\$0.00 -		
Automatic Transfers	\$0.00 +		
Checks	\$15,450.08 -		
Ending Balance	\$5,297.12		

DEPOSITS & CREDITS

10/02	Card Credit Allied Shirts 5099 800-273-4544 TX 78758 2700	238.43
10/02	EB From Checking # 0200852538 Ref# 000000 8643094	3,500.00
10/05	Paypal Transfer Jacqueline Per	242.45
10/19	Paypal Transfer Jacqueline Per	96.80
10/26	EB From Checking # 0200852538 Ref# 000000 8643096	8,000.00
Total Deposits & Credits		\$12,077.68

WITHDRAWALS

10/07	Card Purchase 4te*webelectnet 5734 888-987-6558 FL 33510 2700	87.55
10/13	Recurring Card Transaction Eig*constantcon 5968 855-2295506 MA 02451 2700	45.00
10/13	Card Purchase Zoom.US 888-799 4814 Www.Zoom.US CA 95113 2700	16.34
10/15	Card Purchase EB October Rece 7399 801-413-7200 CA 94103 2700	45.70
10/23	Card Purchase Google*ads57624 7311 Internet CA 94043 2700	350.00
Total Withdrawals		\$544.59

CHECKS

Date	Check No.	Amount	Date	Check No.	Amount
10/05		11,825.08	10/29		3,550.00
10/09		75.00			
Total Checks					\$15,450.08

* Break In Check Number Sequence.

For all your banking needs, please call 1-800-REGIONS (734-4667)
or visit us on the Internet at www.regions.com. (TTY/TDD 1-800-374-5791)



Thank You For Banking With Regions!
2020 Regions Bank Member FDIC. All loans subject to credit approval.



Regions Bank
Verandah Office
11881 Palm Beach Blvd
Ft Myers, FL 33905

JACQUELINE PEREZ FOR SCHOOL BOARD
17675 BOAT CLUB DR
FORT MYERS FL 33908-4467

ACCOUNT #

Cycle 092
Enclosures 26
Page 0
2 of 3

DAILY BALANCE SUMMARY

Date	Balance	Date	Balance	Date	Balance
10/02	12,952.54	10/13	1,146.02	10/23	847.12
10/05	1,369.91	10/15	1,100.32	10/26	8,847.12
10/07	1,282.36	10/19	1,197.12	10/29	5,297.12
10/09	1,207.36				

**PRICING FOR CERTAIN TREASURY MANAGEMENT
SERVICES AND ANALYZED DEPOSITORY
PRODUCTS IS CHANGING EFFECTIVE
JANUARY 1, 2021. CHANGES WILL BE
REFLECTED BEGINNING WITH THE JANUARY
ANALYSIS STATEMENT YOU WILL RECEIVE IN
FEBRUARY. TO VIEW ALL CHANGES, VISIT
REGIONS.COM/SPECIALMESSAGE. PLEASE
CONTACT YOUR TREASURY MGMT. OFFICER WITH
QUESTIONS SPECIFIC TO YOUR ACCOUNT.**



Regions Bank
Verandah Office
11881 Palm Beach Blvd
Ft Myers, FL 33905

JACQUELINE PEREZ FOR SCHOOL BOARD
17675 BOAT CLUB DR
FORT MYERS FL 33908-4467

ACCOUNT #

Cycle 092
Enclosures 26
Page 0
1 of 2

LIFEGREEN NOT FOR PROFIT CHECKING

October 31, 2020 through November 30, 2020

SUMMARY

Beginning Balance	\$5,297.12	Minimum Daily Balance	\$5,092
Deposits & Credits	\$0.00 +	Average Monthly Statement Balance	\$5,186
Withdrawals	\$204.73 -		
Fees	\$0.00 -		
Automatic Transfers	\$0.00 +		
Checks	\$0.00 -		
Ending Balance	\$5,092.39		

WITHDRAWALS

11/10	Recurring Card Transaction Eig*constantcon	5968 855-2295506 MA 02451 2700	45.00
11/10	Card Purchase Zoom.US 888-799 4814 Wwww.Zoom.US	CA 95113 2700	14.99
11/16	Card Purchase Google*ads57624 7372 Internet	CA 94043 2700	144.74
Total Withdrawals			\$204.73

DAILY BALANCE SUMMARY

Date	Balance	Date	Balance
11/10	5,237.13	11/16	5,092.39

PRICING FOR CERTAIN TREASURY MANAGEMENT SERVICES AND ANALYZED DEPOSITORY PRODUCTS IS CHANGING EFFECTIVE JANUARY 1, 2021. CHANGES WILL BE REFLECTED BEGINNING WITH THE JANUARY ANALYSIS STATEMENT YOU WILL RECEIVE IN FEBRUARY. TO VIEW ALL CHANGES, VISIT REGIONS.COM/SPECIALMESSAGE. PLEASE CONTACT YOUR TREASURY MGMT. OFFICER WITH QUESTIONS SPECIFIC TO YOUR ACCOUNT.

For all your banking needs, please call 1-800-REGIONS (734-4667)
or visit us on the Internet at www.regions.com. (TTY/TDD 1-800-374-5791)



Thank You For Banking With Regions!
2020 Regions Bank Member FDIC. All loans subject to credit approval.

Exhibit 8 Page 5 of 11



Regions Bank
Verandah Office
11881 Palm Beach Blvd
Ft Myers, FL 33905

JACQUELINE PEREZ FOR SCHOOL BOARD
17675 BOAT CLUB DR
FORT MYERS FL 33908-4467

ACCOUNT #

Cycle 092
Enclosures 26
Page 0
1 of 2

LIFEGREEN NOT FOR PROFIT CHECKING

December 1, 2020 through December 31, 2020

SUMMARY

Beginning Balance	\$5,092.39	Minimum Daily Balance	\$5,047
Deposits & Credits	\$0.00 +	Average Monthly Statement Balance	\$5,060
Withdrawals	\$45.00 -		
Fees	\$0.00 -		
Automatic Transfers	\$0.00 +		
Checks	\$0.00 -		
Ending Balance	\$5,047.39		

WITHDRAWALS

12/10	Recurring Card Transaction Eig*constantcon	5968 855-2295506 MA 02451 2700	45.00
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DAILY BALANCE SUMMARY

Date	Balance
12/10	5,047.39

COVID RELIEF CHANGE: EXCESSIVE WITHDRAWAL/ITEM FEES ON SAVINGS/MONEY MARKET WILL BE REFUNDED AT CUSTOMER REQUEST ONLY BEGINNING WITH ACTIVITY APPEARING ON YOUR JANUARY 2021 STATEMENT. CD EARLY WITHDRAWAL PENALTIES WILL ONLY BE WAIVED AT CUSTOMER REQUEST BEGINNING 1-2-2021. ALL WAIVERS/REFUNDS ARE AT THE BANK'S DISCRETION. FOR MORE ON REGIONS' COVID RESPONSE, VISIT [REGIONS.COM/CORONAVIRUS](https://www.regions.com/coronavirus).

For all your banking needs, please call 1-800-REGIONS (734-4667)
or visit us on the Internet at www.regions.com. (TTY/TDD 1-800-374-5791)



Thank You For Banking With Regions!
2021 Regions Bank Member FDIC. All loans subject to credit approval.



Regions Bank
Verandah Office
11881 Palm Beach Blvd
Ft Myers, FL 33905

JACQUELINE PEREZ FOR SCHOOL BOARD
17675 BOAT CLUB DR
FORT MYERS FL 33908-4467

ACCOUNT #

Cycle 092
Enclosures 26
Page 0
1 of 2

LIFEGREEN NOT FOR PROFIT CHECKING

January 1, 2021 through January 29, 2021

SUMMARY

Beginning Balance	\$5,047.39	Minimum Daily Balance	\$5,002
Deposits & Credits	\$0.00 +	Average Monthly Statement Balance	\$5,017
Withdrawals	\$45.00 -		
Fees	\$0.00 -		
Automatic Transfers	\$0.00 +		
Checks	\$0.00 -		
Ending Balance	\$5,002.39		

WITHDRAWALS

01/11	Recurring Card Transaction Eig*constantcon	5968 855-2295506 MA 02451 2700	45.00
-------	--	--------------------------------	-------

DAILY BALANCE SUMMARY

Date	Balance
01/11	5,002.39

**You may request account disclosures containing
terms, fees, and rate information (if applicable)
for your account by contacting any Regions office.**

For all your banking needs, please call 1-800-REGIONS (734-4667)
or visit us on the Internet at www.regions.com. (TTY/TDD 1-800-374-5791)



Thank You For Banking With Regions!
2021 Regions Bank Member FDIC. All loans subject to credit approval.

Easy Steps to Balance Your Account

Checking Account

1.	Write here the amount shown on statement for ENDING BALANCE	\$
2.	Enter any deposits which have not been credited on this statement.	\$ +
3.	Total lines 1 & 2	\$ =
4.	Enter total from 4a (column on right side of page)	\$ -
5.	Subtract line 4 from line 3. This should be your checkbook balance.	\$ =

4a List any checks, payments, transfers or other withdrawals from your account that are not on this statement.

Check No.	Amount	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
	\$	
Total Enter in Line 4 at Left		

The law requires you to use "reasonable care and promptness" in examining your bank statement and any checks sent with it and to report to the Bank an unauthorized signature (i.e., a forgery), any alteration of a check, or any unauthorized endorsement. You must report any forged signatures, alterations or forged endorsements to the Bank within the time periods specified under the Deposit Agreement. If you do not do this, the Bank will not be liable to you for the losses or claims arising from the forged signatures, forged endorsements or alterations. Please see the Deposit Agreement for further explanation of your responsibilities with regard to your statement and checks. A copy of our current Deposit Agreement may be requested at any of our branch locations.

Summary of Our Error Resolution Procedures
In Case of Errors or Questions About Your Electronic Transfers
Telephone us toll-free at 1-800-734-4667
or write us at
Regions Electronic Funds Transfer Services
Post Office Box 413
Birmingham, Alabama 35201

Please contact Regions as soon as you can, if you think your statement is wrong or if you need more information about a transfer listed on your statement. We must hear from you no later than sixty (60) days after we sent the FIRST statement on which the problem or error appeared.

(1) Tell us your name and account number.

(2) Describe the error or the transfer you are unsure about and explain as clearly as you can why you believe it is an error or why you need more information.

(3) Tell us the dollar amount of the suspected error.

If you tell us verbally, we may require that you send us your complaint or question in writing within ten (10) business days.

We will determine whether an error occurred within ten (10) business days after we hear from you and will correct any error promptly. If we need more time, however, we may take up to forty-five (45) days to investigate your complaint or question (ninety (90) days for POS transactions or for transfers initiated outside of the United States). If we decide to do this, we will credit your account within ten (10) business days for the amount you think is in error. If, after the investigation, we determine that no bank error occurred, we will debit your account to the extent previously credited. If we ask you to put your complaint in writing and we do not receive it within ten (10) business days, we may not credit your account.

New Accounts- If an alleged error occurred within thirty (30) days after your first deposit to your account was made, we may have up to ninety (90) days to investigate your complaint, provided we credit your account within twenty (20) business days for the amount you think is in error.

If we decide there was no error, we will send you a written explanation within three (3) business days after we finish our investigation. You may ask for copies of the documents that we used in our investigation.

FOR QUESTIONS CONCERNING THIS STATEMENT OR FOR VERIFICATION OF A PREAUTHORIZED DEPOSIT, PLEASE CALL 1-800-REGIONS (734-4667) OR VISIT YOUR NEAREST REGIONS LOCATION.

ADJ - Adjustment
EB - Electronic Banking

RI - Return Item
NSF - Nonsufficient Funds

CR - Credit
APY - Annual Percentage Yield

SC - Service Charge
FWT - Federal Withholding Tax

OD - Overdrawn
*Break in Number Sequence



Regions Bank
Verandah Office
11881 Palm Beach Blvd
Ft Myers, FL 33905

JACQUELINE PEREZ FOR SCHOOL BOARD
17675 BOAT CLUB DR
FORT MYERS FL 33908-4467

ACCOUNT #

Cycle 092
Enclosures 26
Page 0
1 of 2

LIFEGREEN NOT FOR PROFIT CHECKING

January 30, 2021 through February 26, 2021

SUMMARY

Beginning Balance	\$5,002.39	Minimum Daily Balance	\$0
Deposits & Credits	\$5,000.00 +	Average Monthly Statement Balance	\$535
Withdrawals	\$10,002.39 -		
Fees	\$0.00 -		
Automatic Transfers	\$0.00 +		
Checks	\$0.00 -		
Ending Balance	\$0.00		

DEPOSITS & CREDITS

02/02	EB From Checking # 0228094549 Ref# 000000 8643100	5,000.00
-------	---	----------

WITHDRAWALS

02/02	EB to Checking # 0228094549 Ref# 000000 8643101	10,002.39
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DAILY BALANCE SUMMARY

Date	Balance
02/02	0.00

**You may request account disclosures containing
terms, fees, and rate information (if applicable)
for your account by contacting any Regions office.**

For all your banking needs, please call 1-800-REGIONS (734-4667)
or visit us on the Internet at www.regions.com. (TTY/TDD 1-800-374-5791)



Thank You For Banking With Regions!
2021 Regions Bank Member FDIC. All loans subject to credit approval.

CAMPAIGN TREASURER'S REPORT SUMMARY

(1) JACQUELINE PEREZ

Name

(2) 17675 BOAT CLUB DR

Address (number and street)

FORT MYERS, FL 33908

City, State, Zip Code

☐ Check here if address has changed

(3) ID Number: 1562

(4) Check appropriate box(es):

☒ Candidate Office Sought: SCHOOL BOARD-3

☐ Political Committee (PC)

☐ Electioneering Communications Org. (ECO)

☐ Party Executive Committee (PTY)

☐ Independent Expenditure (IE) (also covers an individual making electioneering communications)

☐ Check here if PC or ECO has disbanded

☐ Check here if PTY has disbanded

☐ Check here if no other IE or EC reports will be filed

(5) Report Identifiers

Cover Period: From 10 / 30 / 2020 To 2 / 1 / 2021 Report Type: TRG

☒ Original

☐ Amendment

☐ Special Election Report

(6) Contributions This Report

Cash & Checks \$, , 0 . 00

Loans \$, , 0 . 00

Total Monetary \$, , 0 . 00

In-Kind \$, , 0 . 00

(7) Expenditures This Report

Monetary Expenditures \$, 6 , 464 . 51

Transfers to Office Account \$, , 0 . 00

Total Monetary \$, 6 , 464 . 51

(8) Other Distributions

\$, , 0 . 00

(9) TOTAL Monetary Contributions To Date

\$, 48 , 472 . 07

(10) TOTAL Monetary Expenditures To Date

\$, 51 , 046 . 59

(11) Certification

It is a first degree misdemeanor for any person to falsify a public record (ss. 839.13, F.S.)

I certify that I have examined this report and it is true, correct, and complete:

(Type name)

☐ Individual (only for IE or electioneering comm.) ☐ Treasurer ☐ Deputy Treasurer

X

Signature

(Type name)

☐ Candidate ☐ Chairperson (only for PC and PTY)

X

Signature

CAMPAIGN TREASURER'S REPORT – ITEMIZED CONTRIBUTIONS

(1) Name JACQUELINE PEREZ (2) I.D. Number 1562
 10/30/2020 2/1/2021
 (3) Cover Period ____ / ____ / ____ through ____ / ____ / ____ (4) Page 1 of 0

(5) Date	(7) Full Name (Last, Suffix, First, Middle) Street Address & City, State, Zip Code	(8) Contributor Type Occupation		(9) Contribution Type	(10) In-kind Description	(11) Amendment	(12) Amount
/ /							
/ /							
/ /							
/ /							
/ /							
/ /							
/ /							

CAMPAIGN TREASURER'S REPORT – ITEMIZED EXPENDITURES

(1) Name JACQUELINE PEREZ (2) I.D. Number 1562
 (3) Cover Period 10/30/2020 through 2/1/2021 (4) Page 1 of 1

(5) Date	(7) Full Name (Last, Suffix, First, Middle) Street Address & City, State, Zip Code	(8) Purpose (add office sought if contribution to a candidate)	(9) Expenditure Type	(10) Amendment	(11) Amount
10/30/2020 / /	, FACEBOOK 1 Hacker Way Suite 900 Menlo Park, CA 94025	facebook ads	MO		\$767.81
1					
10/30/2020 / /	Perez, Ricardo 17675 BOAT CLUB DR FORT MYERS, FL 33908	refund	MO		\$500.00
2					
11/30/2020 / /	, FACEBOOK 1 Hacker Way Suite 900 Menlo Park, CA 94025	facebook ads	MO		\$104.31
3					
12/10/2020 / /	, Constant Contact 1601 Trapelo Road Reservoir Place Waltman, Ma 02451	email service	MO		\$45.00
4					
1/10/2021 / /	Contact, Constant 1601 Trapelo Road Reservoir Place Waltman, Ma 02451	email service	MO		\$45.00
5					
1/31/2021 / /	Perez, Jacqueline Edith 17675 BOAT CLUB DR FORT MYERS, FL 33908-4467	repayment loan	MO		\$5,002.39
6					
/ /					
/ /					
/ /					

CAMPAIGN TREASURER'S REPORT SUMMARY

(1) JACQUELINE PEREZ

Name

(2) 17675 BOAT CLUB DR

Address (number and street)

FORT MYERS, FL 33908

City, State, Zip Code

☐ Check here if address has changed

(3) ID Number: 1562

(4) Check appropriate box(es):

☒ Candidate Office Sought: SCHOOL BOARD-3

☐ Political Committee (PC)

☐ Electioneering Communications Org. (ECO)

☐ Party Executive Committee (PTY)

☐ Independent Expenditure (IE) (also covers an individual making electioneering communications)

☐ Check here if PC or ECO has disbanded

☐ Check here if PTY has disbanded

☐ Check here if no other IE or EC reports will be filed

OFFICE USE ONLY
ONLINE SUBMISSION
[1244398]

Submitted on:
3/10/2021 12:48:10 (eastern)

(5) Report Identifiers

Cover Period: From 10 / 30 / 2020 To 2 / 1 / 2021 Report Type: TRG

☐ Original

☒ Amendment

☐ Special Election Report

(6) Contributions This Report

Cash & Checks \$, , 0 . 00

Loans \$, , 0 . 00

Total Monetary \$, , 0 . 00

In-Kind \$, , 872 . 12

(7) Expenditures This Report

Monetary Expenditures \$, , -667 . 39

Transfers to Office Account \$, , 0 . 00

Total Monetary \$, , -667 . 39

(8) Other Distributions

\$, , 0 . 00

(9) TOTAL Monetary Contributions To Date

\$, 47 , 895 . 97

(10) TOTAL Monetary Expenditures To Date

\$, 47 , 895 . 97

(11) Certification

It is a first degree misdemeanor for any person to falsify a public record (ss. 839.13, F.S.)

I certify that I have examined this report and it is true, correct, and complete:

(Type name)

☐ Individual (only for IE or electioneering comm.) ☐ Treasurer ☐ Deputy Treasurer

X

Signature

(Type name)

☐ Candidate ☐ Chairperson (only for PC and PTY)

X

Signature

CAMPAIGN TREASURER'S REPORT – ITEMIZED CONTRIBUTIONS

(1) Name JACQUELINE PEREZ (2) I.D. Number 1562
10/30/2020 2/1/2021
 (3) Cover Period / / through / / (4) Page 1 of 1

(5) Date	(7) Full Name (Last, Suffix, First, Middle) Street Address & City, State, Zip Code	(8) Contributor Type Occupation	(9) Contribution Type	(10) In-kind Description	(11) Amendment	(12) Amount
(6) Sequence Number						
10/30/2020 / /	Perez, Jacqueline E S 17675 Boat Club Drive Fort Myers, FL 33908	S sales/busi ness owner	IK	online ads Add		\$872.12
1						
/ /						
/ /						
/ /						
/ /						
/ /						
/ /						

CAMPAIGN TREASURER'S REPORT – ITEMIZED EXPENDITURES

(1) Name JACQUELINE PEREZ (2) I.D. Number 1562
 (3) Cover Period 10/30/2020 through 2/1/2021 (4) Page 1 of 1

(5) Date	(7) Full Name (Last, Suffix, First, Middle) Street Address & City, State, Zip Code	(8) Purpose (add office sought if contribution to a candidate)	(9) Expenditure Type	(10) Amendment	(11) Amount
11/10/2020 / /	Constant Contact, 1601 Trapelo Road Waltham, ME 02451-	campaign emails	MO	Add	\$45.00
1					
11/10/2020 / /	Zoom, 55 Almanden Blvd, 6th Floor San Jose, CA 95113-	campaign communications	MO	Add	\$14.99
2					
11/16/2020 / /	Google, Google 1600 Amphitheatre Parkway Mountain View, CA 94043	online ads	MO	Add	\$144.74
3					
10/30/2020 / /	, FACEBOOK 1 Hacker Way Suite 900 Menlo Park, CA 94025	facebook ads	MO	Delete	\$767.81
4					
10/30/2020 / /	, FACEBOOK 1 Hacker Way Suite 900 Menlo Park, CA 94025	facebook ads	MO	Add	\$0.00
5					
11/30/2020 / /	, FACEBOOK 1 Hacker Way Suite 900 Menlo Park, CA 94025	facebook ads	MO	Delete	\$104.31
6					
11/30/2020 / /	, FACEBOOK 1 Hacker Way Suite 900 Menlo Park, CA 94025	facebook ads	MO	Add	\$0.00
7					
/ /					

Select Language ▼

Powered by Google Translate

CANDIDATE: JACQUELINE PEREZ

Office: SCHOOL BOARD-3

☒ **Show only financial reports (Hides bio)**

Note: The candidate's photograph and statement are supplied by the candidate and are not endorsed by the County Supervisor of Elections or checked for accuracy.

The following financial reports are available:

Report View Transactions	Monetary Contributions	In-Kind Contributions	Expenditures and Distributions
<u>20M1</u> (1/1/2020 - 1/31/2020)	\$11,283.61	\$486.22	\$73.63
<u>20M2</u> (2/1/2020 - 2/29/2020)	\$5,395.90	\$125.00	\$94.81
<u>20M2</u> (2/1/2020 - 2/29/2020) Amended	\$0.00	\$0.00	\$-23.13
<u>20M3</u> (3/1/2020 - 3/31/2020)	\$0.00	\$125.00	\$0.00
<u>20M3</u> (3/1/2020 - 3/31/2020) Amended	\$0.00	\$0.00	\$3.20
<u>20M3</u> (3/1/2020 - 3/31/2020) Amended	\$100.00	\$0.00	\$0.00
<u>20M4</u> (4/1/2020 - 4/30/2020)	\$0.00	\$125.00	\$1,638.51
<u>20M4</u> (4/1/2020 - 4/30/2020) Amended	\$0.00	\$288.51	\$0.00
<u>20M4</u> (4/1/2020 - 4/30/2020) Amended	\$0.00	\$0.00	\$-240.00
<u>20M5</u> (5/1/2020 - 5/31/2020)	\$67.23	\$0.00	\$0.00

Report View Transactions	Monetary Contributions	In-Kind Contributions	Expenditures and Distributions
<u>20M5</u> (5/1/2020 - 5/31/2020) Amended	\$0.00	\$0.00	\$67.23
<u>20M5</u> (5/1/2020 - 5/31/2020) Amended	\$-67.23	\$0.00	\$-134.46
<u>20P1</u> (6/1/2020 - 6/12/2020)	\$0.00	\$0.00	\$1,887.48
<u>20P2</u> (6/13/2020 - 6/26/2020)	\$0.00	\$0.00	\$2,300.35
<u>20P3</u> (6/27/2020 - 7/10/2020)	\$870.20	\$0.00	\$1,995.80
<u>20P3</u> (6/27/2020 - 7/10/2020) Amended	\$14.80	\$0.00	\$50.00
<u>20P3</u> (6/27/2020 - 7/10/2020) Amended	\$0.00	\$0.00	\$-69.98
<u>20P4</u> (7/11/2020 - 7/17/2020)	\$5,150.00	\$0.00	\$10,606.21
<u>20P4</u> (7/11/2020 - 7/17/2020) Amended	\$0.00	\$336.92	\$-336.24
<u>20P4</u> (7/11/2020 - 7/17/2020) Amended	\$0.00	\$0.00	\$-0.08
<u>20P5</u> (7/18/2020 - 7/24/2020)	\$25.00	\$0.00	\$1,216.51
<u>20P6</u> (7/25/2020 - 7/31/2020)	\$0.00	\$100.00	\$0.00
<u>20P7</u> (8/1/2020 - 8/13/2020)	\$123.67	\$0.00	\$1,460.96
<u>20P7</u> (8/1/2020 - 8/13/2020) Amended	\$-123.67	\$401.63	\$594.88
<u>20G1</u> (8/14/2020 - 8/28/2020)	\$4,556.46	\$0.00	\$4,743.37
<u>20G1</u> (8/14/2020 - 8/28/2020) Amended	\$0.00	\$600.00	\$-600.00
<u>20G2</u> (8/29/2020 - 9/11/2020)	\$8,150.00	\$0.00	\$347.17
<u>20G2</u> (8/29/2020 - 9/11/2020) Amended	\$0.00	\$330.83	\$-330.83

Report View Transactions	Monetary Contributions	In-Kind Contributions	Expenditures and Distributions
<u>20G3</u> (9/12/2020 - 9/25/2020)	\$4,250.00	\$0.00	\$994.02
<u>20G3</u> (9/12/2020 - 9/25/2020) Amended	\$-500.00	\$0.00	\$0.00
<u>20G4</u> (9/26/2020 - 10/2/2020)	\$500.00	\$0.00	\$131.53
<u>20G4</u> (9/26/2020 - 10/2/2020) Amended	\$0.00	\$131.53	\$-369.96
<u>20G5</u> (10/3/2020 - 10/9/2020)	\$100.00	\$300.00	\$11,990.83
<u>20G6</u> (10/10/2020 - 10/16/2020)	\$8,000.00	\$0.00	\$1,493.67
<u>20G6</u> (10/10/2020 - 10/16/2020) Amended	\$0.00	\$0.00	\$-1,386.63
<u>20G7</u> (10/17/2020 - 10/29/2020)	\$0.00	\$0.00	\$3,540.00
<u>20G7</u> (10/17/2020 - 10/29/2020) Amended	\$0.00	\$0.00	\$360.00
<u>TRG</u> (10/30/2020 - 2/1/2021)	\$0.00	\$0.00	\$6,464.51
<u>TRG</u> (10/30/2020 - 2/1/2021) Amended	\$0.00	\$872.12	\$-667.39

Candidate qualifying forms and miscellaneous documents

Enabling Documents

Qualifying Documents



Cheryl Futch <cfutch@lee.vote>

Re: Report Error - TRG [PEREZ]

1 message

jacqueline e <intmarco9@yahoo.com>

Tue, Feb 9, 2021 at 5:07 PM

To: Cheryl Futch <cfutch@lee.vote>, TAMMY LIPA <tlipa@lee.vote>

Tammy and Cheryl

I will have to go month to month. I have been so sick for the past few weeks and just starting to feel better. I beg for another day I will have to give this to my accountant to correct if I cannot figure it out. I will work on it all night and see if I can find any errors. The majority of the funds have been from my own funds. Could it be the in kind ? I know I have not done anything illegal and never would. Please advise on how I should review this. Should I start from the first month and reconcile from there and put through quickbooks?

Jacqueline

On Tuesday, February 9, 2021, 05:00:30 PM EST, Cheryl Futch <cfutch@lee.vote> wrote:

Hello Jacqueline,

You are over in your expenditures. The amendments you are filling are putting you over even further. You need to review all of your campaign reports submitted electronically against your bank statements and correct any necessary reports.

Yours truly,

Cheryl Futch

On Tue, Feb 9, 2021, 4:52 PM Tammy Lipa <tlipa@lee.vote> wrote:

Tammy Lipa

Administration Support Specialist

Post Office Box 2545

Fort Myers, FL 33902-2545

Main Number: 239-533-8683

Direct Number: 239-533-6329

tlipa@lee.voteVisit our website: **www.lee.vote**

Under Florida law, email addresses are public records. If you do not want your email address released in response to a public-records request, do not send electronic email to this entity. Instead, contact this office by phone or in writing.

----- Forwarded message -----

From: **Jacqueline Perez** <jacquelineschooldistrict3@gmail.com>

Date: Tue, Feb 9, 2021 at 4:39 PM

Subject: Re: Report Error - TRG [PEREZ]

To: Tammy Lipa <tlipa@lee.vote>

Please let me know if I did it correctly Thank you for your patience

On Tue, Feb 9, 2021 at 11:14 AM Tammy Lipa <tlipa@lee.vote> wrote:
'Thank you for responding.

Please take care and feel better.

Tammy Lipa

Administration Support Specialist
Post Office Box 2545
Fort Myers, FL 33902-2545

Main Number: 239-533-8683

Direct Number: 239-533-6329

tlipa@lee.vote

Visit our website: **www.lee.vote**

Under Florida law, email addresses are public records. If you do not want your email address released in response to a public-records request, do not send electronic email to this entity. Instead, contact this office by phone or in writing.

On Tue, Feb 9, 2021 at 11:11 AM Jacqueline Perez <jacquelineschooldistrict3@gmail.com> wrote:
Omg I am so sorry. I've been fighting covid symptoms. I will do within the next couple of hours. I am so so sorry.

Sent from my iPhone

On Feb 9, 2021, at 9:33 AM, Tammy Lipa <tlipa@lee.vote> wrote:

Hello Jacqueline,

Your recently filed amendment has been rejected.

An amended report should only report transactions that are being amended.
Please refer to the attached CFR Guidebook for instructions on the correct way to submit an amended report.

Thank you,

Tammy Lipa

Administration Support Specialist
Post Office Box 2545
Fort Myers, FL 33902-2545

Main Number: 239-533-8683

Direct Number: 239-533-6329

tlipa@lee.vote

Visit our website: **www.lee.vote**

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**FLORIDA ELECTIONS COMMISSION
PHONE LOG
Case No.: FEC 21-132**

Respondent: Jacqueline Perez

Complainant: Cheryl Futch (Candidate Qualifying Mgr, Lee County SOE)

1. **Date and time:** 7/22/21 @ 10:18am
Name: Jacqueline Perez
Phone #: 239-878-2200
Summary: I called R using number provided on DS-DE 9 form. I left a message and included the case #; I also mentioned the LS letter that was mailed out on June 16, 2021. I stated that I needed some further details and asked for a call-back.
Entered by: CHS
2. **Date and time:** 7/23/21 @ 10:43am
Name: Jacqueline Perez
Phone #: 239-878-2200
Summary: I called R and left a detailed message. I reiterated the case # and stated that I left a voicemail yesterday (7/22/21). I stated that I wanted to get some further details about 21-132. I requested a call-back and mentioned that I had sent her emails to 2 different email addresses; I stated that she could also reach me by responding to these emails.
Entered by: CHS
3. **Date and time:** 7/28/21 @ 10:36am
Name: Michael Paschenko (w/Regions Bank Legal Dept)
Phone #: 409-256-8439
Summary: I received a call from Mr. Paschenko, as he has received our subpoena request. He stated that he currently has around 70 subpoenas that he is responsible for processing; to that end, he requested a 1-2 week extension. I granted the extension. He also asked whether we were able to provide details about why we are requesting Ms. Perez's records; I stated that this information was confidential. Mr. Paschenko said that this actually makes things easier. He confirmed our discussion via email.
Entered by: CHS
4. **Date and time:**
Name:
Phone #:
Summary:
Entered by:
5. **Date and time:**
Name:
Phone #:
Summary:
Entered by:

6. **Date and time:**

Name:

Phone #:

Summary:

Entered by:

RESPONDENT INTERVIEW MEMO – Call details at #[LOG NUMBER]

- Have you ever run for public office? If so, please name each office you ran for and state what year each election occurred.
- Have you ever been appointed to act as a campaign treasurer for a candidate? If so, please name each such candidate, the office each ran for, and state what year each election occurred.
- Did you act as your own campaign treasurer?
- Why did you decide against appointing a treasurer (besides yourself)?
- Did you receive any outside help in completing/filing your campaign reports (attorney, friend, etc.)?
- Have you ever held the office of chairperson, treasurer, or other similar position for a political committee or electioneering communications organization? If so, please name each committee, state the office you held for each, and state when you held each office.
- Have you ever prepared or signed a campaign treasurer's report? If so, please state the name of the candidate or committee whose report you prepared or signed.
- What action have you taken to determine your responsibilities under Florida's election laws?
- Do you possess a copy of Chapter 106, Florida Statutes? If so, when did you first obtain it? Have you read it?
- Do you possess a copy of the *Candidate and Campaign Treasurer Handbook*? If so, when did you first obtain it? Have you read it?
- Did you receive any other materials from your filing officer? If so, please describe them.
- Why were you unable to timely correct the 2020 TRG?
- Based on campaign reports available thru Lee County SOE's website, there appear too have been amendments filed to numerous CTRs on 3/9/21 and 3/10/21 – can you explain this a bit more?
- To your knowledge, has the Lee County SOE accepted the amendments filed for the 2020 TRG on March 10, 2021?
- Do you recall if there was ever a negative account balance?
- Did anyone else have access to your campaign depository?
- Did you accept contributions using an online platform? If so, can you please provide account statements from this platform?
- Do you have anything else to add for the Commission's consideration regarding the charges specified in the letter of legal sufficiency in this case?

Florida Elections Commission 21-132

Courtney Harrold <Courtney.Harrold@myfloridalegal.com>

Mon 7/19/2021 5:23 PM

To: intmarco9@yahoo.com <intmarco9@yahoo.com>

Good afternoon, Ms. Perez:

I'm reaching out regarding our ongoing investigation (FEC 21-132) into the complaint filed against you by the office of the Lee County Supervisor of Election. A letter of Legal Sufficiency was mailed to you on June 15, 2021.

When would you have an opportunity to speak with me about the complaint and answer a few questions? I'd need about 15 minutes of your time. If you could let me know your availability, I'd greatly appreciate it.

Thank you for your attention to this matter. I look forward to speaking with you.

Have a nice day,

Courtenay Harrold Sheppard

Investigation Specialist II

Florida Elections Commission

107 W. Gaines St., #224

Tallahassee, FL 32399

Office: (850) 922-4539

Direct: (850) 404-5620

Courtenay.harrold@myfloridalegal.com

Florida Elections Commission 21-132

Courtney Harrold <Courtney.Harrold@myfloridalegal.com>

Thu 7/22/2021 10:45 AM

To: jacquelineschooldistrict3@gmail.com <jacquelineschooldistrict3@gmail.com>; intmarco9@yahoo.com <intmarco9@yahoo.com>

Bcc: Courtney Harrold <Courtney.Harrold@myfloridalegal.com>

Good morning, Ms. Perez:

I wanted to follow-up on my voicemail regarding FEC 21-132. I'm looking for about 15 minutes of your time, as I have some standard questions to ask about your campaign. It's also an opportunity for you to provide information you'd like the Commission to consider and, if applicable, supporting documentation.

Please give me a call back so that we can get something scheduled.

I look forward to speaking with you.

Courtenay Harrold Sheppard

Investigation Specialist

Florida Elections Commission

107 W. Gaines St., #224

Tallahassee, FL 32399

(Ph:) 850-922-4539



Florida Elections Commission

107 West Gaines Street, Suite 224 Tallahassee, Florida 32399-6596

Telephone: (850) 922-4539 · Facsimile: (850) 921-0783

FEC@myfloridalegal.com · www.fec.state.fl.us



June 16, 2021

Jacqueline Perez
17675 Boat Club Drive
Fort Myers, FL 33908-4467

RE: Case No.: FEC 21-132; Respondent: Jacqueline Perez

Dear Ms. Perez:

On February 15, 2021, the Florida Elections Commission received a complaint alleging that you violated Florida's election laws. I have reviewed the complaint and find that it contains one or more **legally sufficient allegations**. The Commission staff will investigate the following alleged violations:

Section 106.07(5), Florida Statutes: Respondent, a 2020 candidate for Lee County School Board, District 3, may have certified one or more campaign treasurer's reports were true, correct, and complete when they were not, based upon an apparent deficit after the 2020 termination report was filed, as alleged in the complaint.

Section 106.19(1)(b), Florida Statutes: Respondent, a 2020 candidate for Lee County School Board, District 3, may have failed to report one or more contributions required to be reported by Chapter 106, Florida Statutes, based upon an apparent deficit after the 2020 termination report was filed, as alleged in the complaint.

Section 106.19(1)(c), Florida Statutes: Respondent, a 2020 candidate for Lee County School Board, District 3, may have falsely reported or deliberately failed to include information in one or more campaign treasurer's reports required by Chapter 106, Florida Statutes, based upon an apparent deficit after the 2020 termination report was filed, as alleged in the complaint.

Section 106.19(1)(d), Florida Statutes: Respondent, a 2020 candidate for Lee County School Board, District 3, may have made or authorized one or more expenditures prohibited by Chapter 106, Florida Statutes, based upon an apparent deficit after the 2020 termination report was filed, as alleged in the complaint.

Jacqueline Perez
June 16, 2021
Page 2
FEC 21-132

When we conclude the investigation, a copy of the Report of Investigation (ROI) will be mailed to you at the above address. Based on the results of the investigation, a staff attorney will prepare and present a written Staff Recommendation (SR) to the Commission as to whether there is probable cause to charge you, the Respondent, with violating Chapters 104 or 106, Florida Statutes. You will have an opportunity to respond to both the ROI and the SR. The Commission will then hold one or more hearings to determine whether the alleged violations occurred and, if so, the amount of the fine to be imposed upon you. Notice will be mailed to you and the Complainant at least 14 days before any hearing at which your case is to be considered.

Pursuant to Section 106.25(4)(i)3., Florida Statutes, the Commission may enter into a consent agreement with a Respondent to settle a complaint prior to a finding of probable cause. If you are interested in entering negotiations directed towards reaching a consent agreement to resolve this matter, please contact the Commission and request to speak with the attorney assigned to this case.

Please note that all documents related to this matter will be mailed to the above address unless you notify us of a new address.

Pursuant to Section 106.25, Florida Statutes, complaints, investigations, investigative reports, and other documents relating to an alleged violation of Chapters 104 or 106, Florida Statutes, are confidential until the Commission finds probable cause or no probable cause, unless the Respondent files a written waiver of confidentiality with the Commission. The confidentiality provision does not apply to the Complainant or the Respondent.

Should you retain counsel, your attorney must file a notice of appearance with the Commission before any member of the commission staff can discuss this case with him or her.

For additional information, please refer to the "Frequently Asked Questions" section of the Commission's website.

If you have questions, please contact **Courtenay Harrold Sheppard**, the investigator assigned to this case, by phone at (850) 922-4539 or email at Courtenay.Harrold@myfloridalegal.com.

Sincerely,

Tim Vaccaro
Executive Director

TV/mw

COMPLAINT

The Commission's records and proceedings in a case are confidential until the Commission rules on probable cause. A copy of the complaint will be provided to the person against whom it is brought.

1. PERSON BRINGING COMPLAINT:

Name: Cheryl Futch-Qualifying Officer Work Phone: (239) 533-6311
Address: Lee County Supervisor of Elections-2480 Thompson St Home Phone: () N/A
City: Fort Myers County: Lee State: FL Zip Code: 33901

2. PERSON AGAINST WHOM COMPLAINT IS BROUGHT:

If you intend to name more than one individual or entity, please file multiple complaints. A person can be an individual, political committee, political party, electioneering communication organization, club, corporation, partnership, company, association, or other type of organization.

Name of individual or entity: Jacqueline Perez
Address: 17675 Boat Club Dr Phone: (239) 878-2200
City: Fort Myers County: Lee State: FL Zip Code: 33908

If individual is a candidate, list the office or position sought: Lee County School Board District 3

Have you filed this complaint with the State Attorney's Office? (check one) ☐ Yes ☒ No

Are you alleging a violation of Section 104.271(2), F.S.? (check one) ☐ Yes ☒ No

Are you alleging a violation of Section 104.2715, F.S.? (check one) ☐ Yes ☒ No

3. ALLEGED VIOLATION(S):

Please attach a **concise** narrative statement in which you list the provisions of the Florida Election Code that you believe the person named above may have violated. The Commission has jurisdiction only to investigate provisions of Chapter 104 and Chapter 106, Florida Statutes. Please include the following items as part of your attached statement:

- The facts and actions that you believe support the violations you allege;
- The names/telephone numbers of persons whom you believe may be witnesses to the facts;
- A copy or picture of any political advertisement(s) you mention in your statement;
- A copy of each document you mention in your statement;
- An explanation of why you believe information you reference from websites is relevant; and
- Any other evidence supporting your allegations.

SEE REVERSE SIDE OF DOCUMENT FOR ADDITIONAL INFORMATION

Any person who files a complaint while knowing that the allegations are false or without merit commits a misdemeanor of the first degree, punishable as provided in Sections 775.082 and 775.083, Florida Statutes.

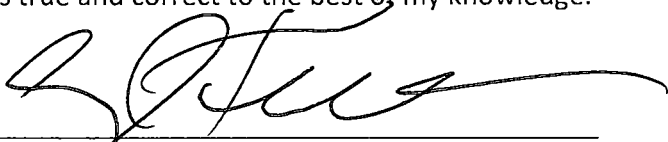
FLORIDA ELECTIONS COMMISSION
107 West Gaines Street, Suite 224, Tallahassee, FL 32399-1050

REC'D: FL ELECTIONS COM
15 FEB '21 PM 3:50

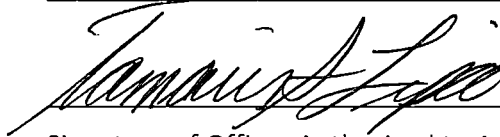
4. **OATH:**

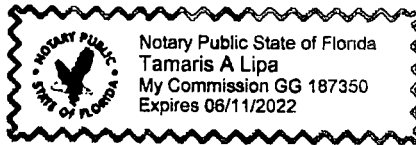
STATE OF FLORIDA
COUNTY OF LEE

I swear or affirm that the above information is true and correct to the best of my knowledge.


Original Signature of Person Bringing Complaint

Sworn to and subscribed before me this 11th day of
February 20, 20 21


Signature of Officer Authorized to Administer Oaths or Notary Public



(Print, Type, or Stamp Commissioned Name of Notary Public)

Personally Known ☒ Or Produced Identification ☐

Type of Identification Produced _____

5. **IMPROPERLY COMPLETED COMPLAINT FORMS MAY BE RETURNED:**

- You **MUST** submit this completed complaint form in order to file a complaint.
- You **MUST** complete **ALL FOUR** of the above sections of this form. **DO NOT** leave any blanks.
- You **MUST** submit the **ORIGINAL** complaint form. Copied/faxed/emailed forms are returned.
- Each complaint can only be filed against **ONE PERSON** or **ENTITY**. If you wish to file against multiple parties, you **MUST** submit a complaint form **for each party** you wish to file against.
- **DO NOT** submit multiple complaint forms with one set of attachments applying to multiple complaints. You **MUST** attach **copies** of attachments **to each complaint** to which they apply.
- **MAKE SURE** the alleged violation(s) of **Chapters 104 or 106** occurred within the last **2 years**.
- **MAKE SURE** your complaint is **sworn** and there is **no defect** to the **notarization** in Section 4.



TOMMY DOYLE, SUPERVISOR OF ELECTIONS

LEE COUNTY ELECTIONS

CONSTITUTIONAL COMPLEX
P.O. BOX 2545
FORT MYERS, FLORIDA 33902
(239) LEE-VOTE
(239) 533-8683
FAX: (239) 533-6310
www.lee.vote

REC'D: P. ELECTIONS COM
15 FEB 21 PM 3:50

February 11, 2021

Florida Elections Commission
107 West Gaines Street – Suite 224
Tallahassee, FL 32399-1050

Re: Jacqueline Perez-Candidate for Lee County School Board District 3
Attachment to Initial Complaint-20-TRG Incomplete Report Filing

Our office contacted Jacqueline Perez by email, mail, and by phone prior to their 20-TRG Amended being due on 02/10/21 by midnight. Despite this, Jacqueline Perez failed to file their amended report to bring their campaign account into balance. 106.07(1)

Also included are copies of supported documentation:

- emails of report reminder notices
- copies of rejected reports
- copy of current report standing
- copies of fine letters and receipts of payment of fines from previously filed reports
- copy of the Incomplete Report Filing letter and emails.
- conversation log
- phone log record
- campaign report log on
- Copy of Active Candidate Acknowledgement
- Copy of Candidate's Enabling documents including his electronic report affidavit agreement and his text messaging agreement
- 2020 CFR Guidebook

Cheryl Futch
Qualifying Officer
On Behalf of Tommy Doyle
Supervisor of Elections



Cheryl Futch <cfutch@lee.vote>

Campaign Treasurer's Termination Report Due [02/01/2021] [20-TRG] [CANDIDATE]

1 message

Lee County Qualifying Department <leeffms@lee.vote>
To: JACQUELINE PEREZ <intmarco9@yahoo.com>

Mon, Feb 1, 2021 at 3:40 PM

This is a reminder that the 20-TRG Campaign Treasurer's Termination report is due on 02/01/2021, TODAY!
Please see the attached documents for important information.

Do not reply to this email.

IF YOU ARE RECEIVING THIS EMAIL WE HAVE EITHER NOT RECEIVED YOUR REPORT OR IT HAS BEEN
REJECTED

2 attachments **2020 Reporting Calendar_CAND_091219.pdf**
117K **Termination Report Due [02-01-21] [20-TRG] [CANDIDATE].pdf**
485K

2020 CANDIDATE REPORTING SCHEDULE

About Contribution Cut-Off Dates: Any contribution received by a candidate with opposition in an election or by the campaign treasurer or a deputy campaign treasurer of such a candidate on the day of that election or less than 5 days before the day of that election must be returned by him or her to the person or committee contributing it and may not be used or expended by or on behalf of the candidate. Section 106.08(3)(a) Florida Statutes. Any contribution received by a candidate or by the campaign treasurer or a deputy campaign treasurer of a candidate after the date at which the candidate withdraws his or her candidacy, or after the date the candidate is defeated, becomes unopposed, or is elected to office must be returned to the person or committee contributing it and may not be used or expended by or on behalf of the candidate. Section 106.08(3)(b) Florida Statute.

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April 10, 2020	20-M3	3/1 through 3/31	Monthly Report
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Please respond that you have reviewed this communication

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02/01/21	10/30/20 through 02/01/21	20-TRG

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https://www.voterfocus.com/ws/wscand/candidate_login.php?county=lee .

A LATE REPORT WILL BE ASSESSED A FINE—FILE ON TIME!

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Cheryl Futch, Qualifying Officer	239-533-6311	cfutch@lee.vote
Tammy Lipa, Administration Support Specialist	239-533-6329	tlipa@lee.vote
Bernie Feliciano, Chief Deputy, Administration	239-533-6304	bfeliciano@lee.vote

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Cheryl Futch <cfutch@lee.vote>

Campaign Treasurer's Termination Report Due [02/01/2021] [20-TRG] [CANDIDATE]

1 message

Lee County Qualifying Department <leeffms@lee.vote>

Mon, Feb 1, 2021 at 8:59 AM

To: JACQUELINE PEREZ <intmarco9@yahoo.com>

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Campaign Treasurer's Termination Report Due [02/01/2021] [20-TRG] [CANDIDATE]

1 message

Lee County Qualifying Department <leeffms@lee.vote>

Tue, Jan 26, 2021 at 8:33 AM

To: JACQUELINE PEREZ <intmarco9@yahoo.com>

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2 attachments

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Campaign Treasurer's Termination Report Due [02/01/2021] [20-TRG] [CANDIDATE]

1 message

Lee County Qualifying Department <leeffms@lee.vote>
To: JACQUELINE PEREZ <intmarco9@yahoo.com>

Wed, Jan 20, 2021 at 9:01 AM

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Cheryl Futch <cfutch@lee.vote>

Campaign Treasurer's Termination Report Due [02/01/2021] [20-TRG] [CANDIDATE]

1 message

Lee County Qualifying Department <leeffms@lee.vote>
To: JACQUELINE PEREZ <intmarco9@yahoo.com>

Mon, Jan 4, 2021 at 8:58 AM

This is a reminder that the 20-TRG Campaign Treasurer's Termination report is due on 02/01/2021.
Please see the attached documents for important information.

Do not reply to this email.

2 attachments **Termination Report Due [02-01-21] [20-TRG] [CANDIDATE].pdf**
485K **2020 Reporting Calendar_CAND_091219.pdf**
117K

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Tammy Lipa, Administration Support Specialist

Bernie Feliciano, Chief Deputy, Administration

239-533-6311

239-533-6329

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Cheryl Futch

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1 message

Lee County Qualifying Department <leeffms@lee.vote>
To: JACQUELINE PEREZ <intmarco9@yahoo.com>

Tue, Dec 1, 2020 at 11:06 AM

Campaign Treasurer's Termination Report Due [02/01/2021] [20-TRG] [CANDIDATE]

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1 message

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NOVEMBER 3, 2020 GENERAL ELECTION REPORTING DATES			
September 4, 2020	20-G1	8/14 through 8/28	60th day prior to General
September 18, 2020	20-G2	8/29 through 9/11	46th day prior to General
October 2, 2020	20-G3	9/12 through 9/25	32nd day prior to General
October 9, 2020	20-G4	9/26 through 10/2	25th day prior to General
October 16, 2020	20-G5	10/3 through 10/9	18th day prior to General
October 23, 2020	20-G6	10/10 through 10/16	11th day prior to General
October 30, 2020	20-G7	10/17 through 10/29	4th day prior to General
LAST DAY TO RECEIVE CAMPAIGN CONTRIBUTIONS PRIOR TO THE NOVEMBER 3, 2020 ELECTION IS MIDNIGHT, THURSDAY, OCTOBER 29, 2020 (F.S. 106.08[3][a])			
TERMINATION REPORT DUE DATES			
July 23, 2020	20-TRJQ	4/1 through 7/23	This is the 90-day termination report for judicial candidates unopposed after the close of qualifying
September 10, 2020	20-TRQ	6/13 through 9/10	This is the 90-day termination report for candidates unopposed after the close of qualifying
November 16, 2020	20-TRP	8/14 through 11/16	This is the 90-day termination report for candidates defeated in 8/18/20 Primary Election
February 1, 2021	20-TRG	10/30 through 2/1	This is the 90-day termination report for candidates elected or defeated in 11/3/20 General Election



Cheryl Futch <cfutch@lee.vote>

Campaign Treasurer's Termination Report Due [02/01/2021] [20-TRG] [CANDIDATE]

1 message

Lee County Qualifying Department <leeffms@lee.vote>

Tue, Dec 1, 2020 at 11:00 AM

To: JACQUELINE PEREZ <intmarco9@yahoo.com>

Campaign Treasurer's Termination Report Due [02/01/2021] [20-TRG] [CANDIDATE]

This is a reminder that the 20-TRG Campaign Treasurer's Termination report is due on 02/01/2021.
Please see the attached documents for important information.

Do not reply to this email.

2 attachments**Termination Report Due [02-01-21] [20-TRG] [CANDIDATE].pdf**

427K

**2020 Reporting Calendar_CAND_091219.pdf**

117K

Please respond that you have reviewed this communication

The absence of a reminder notice does not release the candidate or campaign treasurer from his/her obligation to timely file the required campaign termination report.

Due Date	Reporting Period Covered	Report Type Code
02/01/21	10/30/20 through 02/01/21	20-TRG

User ID, password and PIN #s required. Submit the report **BEFORE** (Midnight) 11:59 p.m. Eastern Standard Time of the report's due date. Access the Campaign Financial Reporting System by logging on:

https://www.voterfocus.com/ws/wscand/candidate_login.php?county=lee .

A LATE REPORT WILL BE ASSESSED A FINE—FILE ON TIME!

Do not hesitate to contact the Qualifying Department if you have questions or concerns.

Cheryl Futch, Qualifying Officer	239-533-6311	cfutch@lee.vote
Tammy Lipa, Administration Support Specialist	239-533-6329	tlipa@lee.vote
Bernie Feliciano, Chief Deputy, Administration	239-533-6304	bfeliciano@lee.vote

Cheryl Futch
Qualifying Officer
Post Office Box 2545
Fort Myers, FL 33902-2545

Main Number: 239-533-8683
Direct Number: 239-533-6329

tlipa@lee.vote

Visit our website: www.lee.vote

Under Florida law, email addresses are public records. If you do not want your email address released in response to a public-records request, do not send electronic email to this entity. Instead, contact this office by phone or in writing.

2020 CANDIDATE REPORTING SCHEDULE

About Contribution Cut-Off Dates: Any contribution received by a candidate with opposition in an election or by the campaign treasurer or a deputy campaign treasurer of such a candidate on the day of that election or less than 5 days before the day of that election must be returned by him or her to the person or committee contributing it and may not be used or expended by or on behalf of the candidate. Section 106.08(3)(a) Florida Statutes. Any contribution received by a candidate or by the campaign treasurer or a deputy campaign treasurer of a candidate after the date at which the candidate withdraws his or her candidacy, or after the date the candidate is defeated, becomes unopposed, or is elected to office must be returned to the person or committee contributing it and may not be used or expended by or on behalf of the candidate. Section 106.08(3)(b) Florida Statute.

DUE DATE	REPORT TYPE	PERIOD COVERED	SPECIAL INSTRUCTIONS
January 10, 2020	19-M12	12/1 through 12/31	Monthly Report
February 10, 2020	20-M1	1/1 through 1/31	Monthly Report
March 10, 2020	20-M2	2/1 through 2/29	Monthly Report
April 10, 2020	20-M3	3/1 through 3/31	Monthly Report
May 11, 2020	20-M4	4/1 through 4/30	Monthly Report
June 10, 2020	20-M5	5/1 through 5/31	Monthly Report
AUGUST 18, 2020 PRIMARY ELECTION REPORTING DATES			
June 19, 2020	20-P1	6/1 through 6/12	60th day prior to Primary
July 6, 2020	20-P2	6/13 through 6/26	46th day prior to Primary
July 17, 2020	20-P3	6/27 through 7/10	32nd day prior to Primary
July 24, 2020	20-P4	7/11 through 7/17	25th day prior to Primary
July 31, 2020	20-P5	7/18 through 7/24	18th day prior to Primary
August 7, 2020	20-P6	7/25 through 7/31	11th day prior to Primary
August 14, 2020	20-P7	8/1 through 8/13	4th day prior to Primary
LAST DAY TO RECEIVE CAMPAIGN CONTRIBUTIONS PRIOR TO THE AUGUST 18, 2020 ELECTION IS MIDNIGHT, THURSDAY, AUGUST 13, 2020 (F.S. 106.08[3][a])			
NOVEMBER 3, 2020 GENERAL ELECTION REPORTING DATES			
September 4, 2020	20-G1	8/14 through 8/28	60th day prior to General
September 18, 2020	20-G2	8/29 through 9/11	46th day prior to General
October 2, 2020	20-G3	9/12 through 9/25	32nd day prior to General
October 9, 2020	20-G4	9/26 through 10/2	25th day prior to General
October 16, 2020	20-G5	10/3 through 10/9	18th day prior to General
October 23, 2020	20-G6	10/10 through 10/16	11th day prior to General
October 30, 2020	20-G7	10/17 through 10/29	4th day prior to General
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September 10, 2020	20-TRQ	6/13 through 9/10	This is the 90-day termination report for candidates unopposed after the close of qualifying
November 16, 2020	20-TRP	8/14 through 11/16	This is the 90-day termination report for candidates defeated in 8/18/20 Primary Election
February 1, 2021	20-TRG	10/30 through 2/1	This is the 90-day termination report for candidates elected or defeated in 11/3/20 General Election



Cheryl Futch <cfutch@lee.vote>

Report Submitted: JACQUELINE PEREZ - SCHOOL BOARD-3 (2021-02-01)

1 message

Candidate Financial <CFinance@vrsystems.com>

Thu, Feb 11, 2021 at 12:00 AM

To: bfeliciano@leeelections.com, cfutch@leeelections.com, tlipa@leeelections.com

Note: This is an Automated Email from the Campaign Finance System. This email is sent from an email address that is not monitored -- If you wish to communicate with the reporting entity, please "Forward" this email to the reporter's email address. Using a "Reply To" message will not reach them.

JACQUELINE PEREZ - (lee) Candidate for SCHOOL BOARD-3 has submitted a financial report (2021-02-01 - Confirmation #1243683). Click here to log in : https://www.voterfocus.com/CampaignFinance/cf_cpanel.php

Select Language ▼

Powered by Google Translate

CANDIDATE: JACQUELINE PEREZ

Office: SCHOOL BOARD-3

Report Date: TRG (10/30/2020 - 2/1/2021)

CAMPAIGN TREASURER'S REPORT – ITEMIZED CONTRIBUTIONS

Seq#	Contributor	Entity	Occupation	Cont. Type	
Date			Amend		Amount
Total Contributions					\$0.00

CAMPAIGN TREASURER'S REPORT – IN-KIND CONTRIBUTIONS

Seq#	Contributor	Entity	Occupation	In-Kind Description	
Date			Amend		Amount
Total In-Kind Contributions					\$0.00

CAMPAIGN TREASURER'S REPORT – ITEMIZED EXPENDITURES

Seq#	Vendor	Purpose	Exp. Type	
Date			Amend	Amount
#1	FACEBOOK	Facebook Ads	Monetary	
10/30/2020	1 Hacker Way Suite 900 Menlo Park, CA 94025			\$767.81
#2	Ricardo Perez	Refund	Monetary	
10/30/2020	17675 BOAT CLUB DR FORT MYERS, FL 33908			\$500.00
#3	FACEBOOK	Facebook Ads	Monetary	
11/30/2020	1 Hacker Way Suite 900 Menlo Park, CA 94025			\$104.31
#4	Constant Contact	Email Service	Monetary	
12/10/2020	1601 Trapelo Road Reservoir Place Waltham, Ma 02451			\$45.00

#5	Constant Contact	Email service	Monetary	
1/10/2021	1601 Trapelo Road Reservoir Place Waltman, Ma 02451			\$45.00
#6	Jacqueline Edith Perez	Repayment Loan	Monetary	
1/31/2021	17675 BOAT CLUB DR FORT MYERS, FL 33908-4467			\$5,002.39
Total Expenditures				\$6,464.51

CAMPAIGN TREASURER'S REPORT – FUND TRANSFERS

Seq#	Institution	Transfer Type	Nature of Account	
Date			Amend	Amount

CAMPAIGN TREASURER'S REPORT – DISTRIBUTIONS

Seq#	Vendor	Purpose	Expenditure Related Exp.	
Date			Amend	Amount

* Petty cash expenditures are realized when the funds are withdrawn for petty cash. Therefore, the referenced item is not included in the total.



Cheryl Futch <cfutch@lee.vote>

Report Submitted: JACQUELINE PEREZ - SCHOOL BOARD-3 (2020-02-10)

1 message

Candidate Financial <CFinance@vrsystems.com>

Wed, Feb 10, 2021 at 11:38 PM

To: bfeliciano@leeelections.com, cfutch@leeelections.com, tlipa@leeelections.com

Note: This is an Automated Email from the Campaign Finance System. This email is sent from an email address that is not monitored -- If you wish to communicate with the reporting entity, please "Forward" this email to the reporter's email address. Using a "Reply To" message will not reach them.

JACQUELINE PEREZ - (lee) Candidate for SCHOOL BOARD-3 has submitted a financial report (2020-02-10 - Confirmation #1243681). Click here to log in : https://www.voterfocus.com/CampaignFinance/cf_cpanel.php

Select Language ▼

Powered by Google Translate

CANDIDATE: JACQUELINE PEREZ

Office: SCHOOL BOARD-3

Report Date: 20M1 (1/1/2020 - 1/31/2020)

CAMPAIGN TREASURER'S REPORT – ITEMIZED CONTRIBUTIONS

Seq#	Contributor	Entity	Occupation	Cont. Type	
Date			Amend		Amount
Total Contributions					\$0.00

CAMPAIGN TREASURER'S REPORT – IN-KIND CONTRIBUTIONS

Seq#	Contributor	Entity	Occupation	In-Kind Description	
Date			Amend		Amount
Total In-Kind Contributions					\$0.00

CAMPAIGN TREASURER'S REPORT – ITEMIZED EXPENDITURES

Seq#	Vendor	Purpose	Exp. Type	
Date			Amend	Amount
#1	Stripe Stripe	Fee Transaction	Monetary	
1/21/2020	510 Townsend St San Francisco, CA 94103		Add	\$15.00
#2	Paypal	Fee Transaction	Monetary	
1/23/2020	2211 N 1st st San Jose, CA 95131		Add	\$3.32
Total Expenditures				\$18.32

CAMPAIGN TREASURER'S REPORT – FUND TRANSFERS

Seq#	Institution	Transfer Type	Nature of Account	
Date			Amend	Amount

CAMPAIGN TREASURER'S REPORT – DISTRIBUTIONS

Seq#	Vendor	Purpose	Expenditure Related Exp.	
Date			Amend	Amount

* Petty cash expenditures are realized when the funds are withdrawn for petty cash. Therefore, the referenced item is not included in the total.



Cheryl Futch <cfutch@lee.vote>

Report Submitted: JACQUELINE PEREZ - SCHOOL BOARD-3 (2021-02-01)1 message

Candidate Financial <CFinance@vrsystems.com>

Mon, Feb 8, 2021 at 10:03 PM

To: bfeliciano@leeelections.com, cfutch@leeelections.com, tlipa@leeelections.com

Note: This is an Automated Email from the Campaign Finance System. This email is sent from an email address that is not monitored -- If you wish to communicate with the reporting entity, please "Forward" this email to the reporter's email address. Using a "Reply To" message will not reach them.

JACQUELINE PEREZ - (lee) Candidate for SCHOOL BOARD-3 has submitted a financial report (2021-02-01 - Confirmation #1243488). Click here to log in : https://www.voterfocus.com/CampaignFinance/cf_cpanel.php

Select Language ▼

Powered by Google Translate

CANDIDATE: JACQUELINE PEREZ

Office: SCHOOL BOARD-3

Report Date: TRG (10/30/2020 - 2/1/2021)

CAMPAIGN TREASURER'S REPORT – ITEMIZED CONTRIBUTIONS

Seq#	Contributor	Entity	Occupation	Cont. Type	
Date			Amend		Amount
Total Contributions					\$0.00

CAMPAIGN TREASURER'S REPORT – IN-KIND CONTRIBUTIONS

Seq#	Contributor	Entity	Occupation	In-Kind Description	
Date			Amend		Amount
Total In-Kind Contributions					\$0.00

CAMPAIGN TREASURER'S REPORT – ITEMIZED EXPENDITURES

Seq#	Vendor	Purpose	Exp. Type	
Date			Amend	Amount
#1	Jacqueline Perez	Facebook	Monetary	
2/1/2021	1 Hacker Way	Ads	Add	\$767.81
	Suite 900	Reimbursed		
	Menlo Park, CA 94025			
#2	Jacqueline Perez	Facebook Ads	Monetary	
2/1/2021	1 Hacker Way	Reimbursement	Add	\$104.31
	Suite 900			
	Menlo Park, CA 94025			
#3	Constant Contact	Email	Monetary	
12/10/2020	1601 Trapelo Rd	Service	Add	\$45.00
	Waltman, Ma 02451	Constant		
		contact		
#4	Constant Contact	Email	Monetary	
1/10/2021	1601 Trapelo Rd	service	Add	\$45.00
	Waltman, Ma 02451	Constant		

#5	Constant Contact	Email Service	Monetary	
11/10/2020	1601 Trapelo Rd		Add	\$45.00
	Waltman, Ma 02451			
#6	Zoom Us	Promo Video for	Monetary	
11/10/2020	55 Almaden Blvd	campaign	Add	\$14.99
	San jose, Ca 94043			
#7	Google Ads	Google ads On line	Monetary	
11/16/2020	1600 Amphitheatre		Add	\$144.74
	Pkway			
	Mountain View, Ca			
	94043			
#8	Perez Jacqueline	Reimbursement	Monetary	
2/1/2021	17675 Boat Club dr	of Loan	Add	\$2,329.36
	fort myers, fl 33908			
Total Expenditures				\$3,496.21

CAMPAIGN TREASURER'S REPORT – FUND TRANSFERS

Seq#	Institution	Transfer Type	Nature of Account	
Date			Amend	Amount

CAMPAIGN TREASURER'S REPORT – DISTRIBUTIONS

Seq#	Vendor	Purpose	Expenditure Related Exp.	
Date			Amend	Amount

* Petty cash expenditures are realized when the funds are withdrawn for petty cash. Therefore, the referenced item is not included in the total.

Select Language ▼

Powered by Google Translate

CANDIDATE: JACQUELINE PEREZ

Office: SCHOOL BOARD-3

Report Date: TRG (10/30/2020 - 2/1/2021)

CAMPAIGN TREASURER'S REPORT – ITEMIZED CONTRIBUTIONS

Seq#	Contributor	Entity	Occupation	Cont. Type	
Date			Amend		Amount
Total Contributions					\$0.00

CAMPAIGN TREASURER'S REPORT – IN-KIND CONTRIBUTIONS

Seq#	Contributor	Entity	Occupation	In-Kind Description	
Date			Amend		Amount
Total In-Kind Contributions					\$0.00

CAMPAIGN TREASURER'S REPORT – ITEMIZED EXPENDITURES

Seq#	Vendor	Purpose	Exp. Type	
Date			Amend	Amount
#1	Facebook	Facebook Ads	Monetary	
10/30/2020	1 Hacker Way Menlo Park, Ca 94025		Add	\$767.81
#2	Ricardo Perez	Refund	Monetary	
10/30/2020	17675 Boat Club Dr Fort Myers, Fl 33908		Add	\$500.00
#3	Facebook	Ads Facebook	Monetary	
11/30/2020	1 Hacker Way Suite 900 Menlo Park, Ca 94025		Add	\$104.31
#4	Constant Contact	email service	Monetary	
12/10/2020	1601 Trapelo Road Waltham, Ma 02451		Add	\$45.00

#5	Constant Contact	Email Service	Monetary	
1/10/2021	1601 Trapelo Road		Add	\$45.00
	Waltman, Ma 02451			
#6	Jacqueline Perez	Reimbursement for loan	Monetary	
1/31/2021	17675 Boat Club Dr		Add	\$2,427.87
	Fort Myers, Fl 33908			
Total Expenditures				\$3,889.99

CAMPAIGN TREASURER'S REPORT – FUND TRANSFERS

Seq#	Institution	Transfer Type	Nature of Account	
Date			Amend	Amount

CAMPAIGN TREASURER'S REPORT – DISTRIBUTIONS

Seq#	Vendor	Purpose	Expenditure Related Exp.	
Date			Amend	Amount

* Petty cash expenditures are realized when the funds are withdrawn for petty cash. Therefore, the referenced item is not included in the total.



Cheryl Futch <cfutch@lee.vote>

Report Submitted: JACQUELINE PEREZ - SCHOOL BOARD-3 (2021-02-01)

1 message

Candidate Financial <CFinance@vrsystems.com>

Tue, Feb 9, 2021 at 4:38 PM

To: bfeliciano@leeelections.com, cfutch@leeelections.com, tlipa@leeelections.com

Note: This is an Automated Email from the Campaign Finance System. This email is sent from an email address that is not monitored -- If you wish to communicate with the reporting entity, please "Forward" this email to the reporter's email address. Using a "Reply To" message will not reach them.

JACQUELINE PEREZ - (lee) Candidate for SCHOOL BOARD-3 has submitted a financial report (2021-02-01 - Confirmation #1243537). Click here to log in : https://www.voterfocus.com/CampaignFinance/cf_cpanel.php

Select Language ▼

Powered by Google Translate

CANDIDATE: JACQUELINE PEREZ

Office: SCHOOL BOARD-3

Report Date: TRG (10/30/2020 - 2/1/2021)

CAMPAIGN TREASURER'S REPORT – ITEMIZED CONTRIBUTIONS

Seq#	Contributor	Entity	Occupation	Cont. Type	
Date			Amend		Amount
Total Contributions					\$0.00

CAMPAIGN TREASURER'S REPORT – IN-KIND CONTRIBUTIONS

Seq#	Contributor	Entity	Occupation	In-Kind Description	
Date			Amend		Amount
Total In-Kind Contributions					\$0.00

CAMPAIGN TREASURER'S REPORT – ITEMIZED EXPENDITURES

Seq#	Vendor	Purpose	Exp. Type	
Date			Amend	Amount
#1	Jacqueline Perez	Reimbursement	Monetary	
1/31/2021	17675 Boat Club Dr	for loans	Add	\$2,574.52
	Fort Myers, FL 33908	from my		
		campaign		
Total Expenditures				\$2,574.52

CAMPAIGN TREASURER'S REPORT – FUND TRANSFERS

Seq#	Institution	Transfer Type	Nature of Account	
Date			Amend	Amount

CAMPAIGN TREASURER'S REPORT – DISTRIBUTIONS

Seq#	Vendor	Purpose	Expenditure Related Exp.	
Date			Amend	Amount

* Petty cash expenditures are realized when the funds are withdrawn for petty cash. Therefore, the referenced item is not included in the total.

Select Language ▼

Powered by Google Translate

REPORTING GROUP (ELECTION/COMMITTEES)

2020 CANDIDATES (11/3/2020)

Current reporting group (Election/Committees):

2020 CANDIDATES (11/3/2020) ▼ Go

(You can select another available reporting group from the above list.)

This web site lists candidates for county and local offices and committees/PACs.
Candidates for federal, state and multi-county offices are reported on the [Division of Elections of the Department of State Website](#).

Information contained within the reports has been generated by and is the sole responsibility of the reporting entity

NOTE: Each financial reporter row below can be "clicked" to see more details.

Candidates

Office: CLERK OF THE CIRCUIT COURT

LINDA DOGGETT (REP) (<i>INACTIVE-ELECTED</i>)	Contributions	\$35,035.00
	In-Kind	\$0.00
	Expenditures	\$35,035.00

Office: PROPERTY APPRAISER

MATT CALDWELL (REP) (<i>INACTIVE-ELECTED</i>)	Contributions	\$49,977.00
	In-Kind	\$0.00
	Expenditures	\$49,977.00

ELAINA COSENTINO (WRI) (<i>INACTIVE-DEFEATED</i>)	Contributions	\$0.00
	In-Kind	\$0.00
	Expenditures	\$0.00

STEPHEN ALLEN CUNNINGHAM (REP) (<i>INACTIVE-WITHDRAWN</i>)	Contributions	\$0.00
	In-Kind	\$0.00
	Expenditures	\$0.00

MATT MILLER (REP) (<i>INACTIVE-DEFEATED</i>)	Contributions	\$20,000.00
	In-Kind	\$200.00
	Expenditures	\$20,000.00

Office: SHERIFF

Contributions	\$107,951.40
---------------	--------------

JAMES A LEAVENS (REP)	(INACTIVE- DEFEATED)	In-Kind	\$5,604.35
		Expenditures	\$107,951.40
CARMINE MARCENO (REP)	(INACTIVE- ELECTED)	Contributions	\$602,550.39
		In-Kind	\$17,680.61
		Expenditures	\$602,550.39
CARMEN MCKINNEY (NPA)	(INACTIVE- DEFEATED)	Contributions	\$11,170.00
		In-Kind	\$0.00
		Expenditures	\$11,170.00
ROBERT M NEELD (DEM)	(INACTIVE- DEFEATED)	Contributions	\$10,300.00
		In-Kind	\$0.00
		Expenditures	\$10,300.00
MICHAEL "COACH RAY" QUALLS (NPA)	(INACTIVE- DEFEATED)	Contributions	\$28,477.60
		In-Kind	\$176.25
		Expenditures	\$28,477.60

Office: SUPERVISOR OF ELECTIONS

TOMMY DOYLE (REP)	(INACTIVE- ELECTED)	Contributions	\$10,000.00
		In-Kind	\$0.00
		Expenditures	\$10,000.00

Office: TAX COLLECTOR

NOELLE BRANNING (REP)	(INACTIVE- ELECTED)	Contributions	\$13,600.00
		In-Kind	\$218.33
		Expenditures	\$13,600.00

Office: COUNTY COMMISSIONER-1

MICHAEL J DREIKORN (REP)	(INACTIVE- DEFEATED)	Contributions	\$47,473.28
		In-Kind	\$4,167.00
		Expenditures	\$47,473.28
KELSEY HOTCHKISS (WRI)	(INACTIVE- DEFEATED)	Contributions	\$0.00
		In-Kind	\$0.00
		Expenditures	\$0.00
KEVIN RUANE (REP)	(INACTIVE- ELECTED)	Contributions	\$354,404.00
		In-Kind	\$4,200.00
		Expenditures	\$354,404.00

Office: COUNTY COMMISSIONER-3

NICHOLAS "NICK" BATOS (REP)	(INACTIVE- DEFEATED)	Contributions	\$85,474.96
		In-Kind	\$9,157.15
		Expenditures	\$85,474.96
MOLLY HANNIGAN (WRI)	(INACTIVE- WITHDRAWN)	Contributions	\$0.00
		In-Kind	\$0.00
		Expenditures	\$0.00
PAULA R KIKER (REP)	(INACTIVE- WITHDRAWN)	Contributions	\$44,960.00
		In-Kind	\$0.00

		Expenditures	\$44,960.00
RAY SANDELLI (REP)	(INACTIVE-ELECTED)	Contributions	\$171,046.00
		In-Kind	\$3,915.56
		Expenditures	\$171,046.00
TODD JAMES TRUAX (DEM)	(INACTIVE-DEFEATED)	Contributions	\$59,095.00
		In-Kind	\$0.00
		Expenditures	\$59,095.00

Office: COUNTY COMMISSIONER-5

JUAN A GONZALEZ (DEM)	(INACTIVE-DEFEATED)	Contributions	\$9,946.82
		In-Kind	\$812.47
		Expenditures	\$9,946.82
STEVEN PATRICK HAAS (REP)	(INACTIVE-DEFEATED)	Contributions	\$6,350.00
		In-Kind	\$0.00
		Expenditures	\$6,350.00
FRANK MANN (REP)	(INACTIVE-ELECTED)	Contributions	\$69,765.00
		In-Kind	\$0.00
		Expenditures	\$69,765.00
KAYLEY MCHUGH (WRI)	(INACTIVE-WITHDRAWN)	Contributions	\$0.00
		In-Kind	\$0.00
		Expenditures	\$0.00

Office: COUNTY COURT JUDGE-GRP 5

HOWARD ANDREW SWETT (NON)	(INACTIVE-ELECTED)	Contributions	\$13,050.00
		In-Kind	\$100.00
		Expenditures	\$13,050.00

Office: COUNTY COURT JUDGE-GRP 6

JOSEPHINE M GAGLIARDI (NON)	(INACTIVE-ELECTED)	Contributions	\$6,500.00
		In-Kind	\$0.00
		Expenditures	\$6,500.00

Office: SCHOOL BOARD-2

EMORY CAVIN (NON)	(INACTIVE-DEFEATED)	Contributions	\$1,850.00
		In-Kind	\$0.00
		Expenditures	\$1,850.00
CHARLA FOX (NON)	(INACTIVE-DEFEATED)	Contributions	\$13,470.00
		In-Kind	\$0.00
		Expenditures	\$13,470.00
MELISA W GIOVANNELLI (NON)	(INACTIVE-ELECTED)	Contributions	\$58,425.00
		In-Kind	\$1,075.33
		Expenditures	\$58,425.00
JOHN F "JEFF" MCCULLERS (NON)	(INACTIVE-DEFEATED)	Contributions	\$18,390.00
		In-Kind	\$125.00
		Expenditures	\$18,390.00

Office: SCHOOL BOARD-3

BRIAN DIGRAZIO (NON)	(INACTIVE- DEFEATED)	Contributions	\$14,207.95
		In-Kind	\$10.00
		Expenditures	\$14,207.95
CHRIS PATRICCA (NON)	(INACTIVE- ELECTED)	Contributions	\$70,906.86
		In-Kind	\$1,251.28
		Expenditures	\$70,906.86
JACQUELINE PEREZ (NON)	(Active-DEFEATED)	Contributions	\$48,472.07
		In-Kind	\$1,549.73
		Expenditures	\$51,046.59

Office: SCHOOL BOARD-7 AT LARGE

GEORGE PETER BOHATCH (NON)	(INACTIVE- WITHDRAWN)	Contributions	\$0.00
		In-Kind	\$0.00
		Expenditures	\$0.00
PETE BOHATCH (NON)	(INACTIVE- DEFEATED)	Contributions	\$6,330.00
		In-Kind	\$333.08
		Expenditures	\$6,330.00
LISANDRA COLON (NON)	(INACTIVE- WITHDRAWN)	Contributions	\$301.00
		In-Kind	\$142.82
		Expenditures	\$301.00
CATHLEEN MORGAN (NON)	(INACTIVE- ELECTED)	Contributions	\$15,775.00
		In-Kind	\$626.77
		Expenditures	\$15,775.00
MELISSA J PANNETON (NON)	(INACTIVE- WITHDRAWN)	Contributions	\$0.00
		In-Kind	\$10.65
		Expenditures	\$0.00
CURT SHEARD (NON)	(INACTIVE- DEFEATED)	Contributions	\$5,695.77
		In-Kind	\$0.00
		Expenditures	\$5,695.77

Office: LEE MEMORIAL HEALTH SYSTEM-1

STEVE BROWN (NON)	(INACTIVE- ELECTED)	Contributions	\$0.00
		In-Kind	\$0.00
		Expenditures	\$0.00
THERESE EVERLY (NON)	(INACTIVE- ELECTED)	Contributions	\$2,350.00
		In-Kind	\$0.00
		Expenditures	\$2,350.00
CAROL ANN TURIELLO (NON)	(INACTIVE- DEFEATED)	Contributions	\$0.00
		In-Kind	\$0.00
		Expenditures	\$0.00

Office: LEE MEMORIAL HEALTH SYSTEM-3

SANDY COHEN (NON)	Contributions	\$20,266.04
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CANDIDATE: JACQUELINE PEREZ

Office: SCHOOL BOARD-3

CAMPAIGN TREASURER'S REPORT – ITEMIZED CONTRIBUTIONS

Seq# Date	Contributor	Entity	Occupation Amend	Cont. Type	Amount
#1 1/8/2020	Jacqueline E Perez 17675 Boat Club Dr Fort Myers, FL 33908	Candidate to Themselves	Sales/Office	Loan	\$10,000.00
#2 1/13/2020	Mo Winograd P.O. Box 221 Phoencia, NY 12464	Individual	Retired	Check	\$52.23
#3 1/13/2020	Kerry Constantine ***Protected Voter***	Individual	Broker	Check	\$50.00
#4 1/15/2020	Kathleen Mayo 8955 Forest St. Fort Myers, Fl 33907	Individual	Retired	Check	\$104.15
#5 1/20/2020	Carlos Briones 1727 NE 1st Street Cape Coral, Fl 33909	Individual	Warehouse	Check	\$25.00
#6 1/31/2020	Frigid Rigid 16181 Old US Fort Myers, Fl 33912	Business	Business	Check	\$1,000.00
#7 1/20/2020	Reginald Snell 3321 MCGREGOR Blvd Fort Myers, Fl 33901	Individual	ProjectManager	Check	\$52.23
#8 2/7/2020	Qiara Perez 17675 BOAT CLUB DR FORT MYERS, Fl 33908	Individual	StateEmployee	Check	\$1,000.00
#9 2/7/2020	Debbie Fosselman 10416 Yorkstone Dr Bonita Springs, Fl 34135	Individual	Retired	Check	\$500.00

#10	Judy Alves	Individual	RetiredAttorney	Check	
2/5/2020	18 Georgetown Fort Myers, FL 33919				\$519.52
#11	Valerie Custer	Individual	Homemaker/volunteer	Check	
2/1/2020	6012 Macbeth Lane Naples, FL 33908				\$52.23
#12	Elier Garcia	Individual	Mechanic	Check	
2/2/2020	18213 Maple Rd Fort Myers, FL 33967				\$104.15
#13	Lucas I Cesario	Individual	Supervisor	Check	
2/6/2020	1918 SW 13th lane Cape Coral, FI 33991				\$50.00
#14	Rosario Chavez	Individual	Retired	Check	
2/7/2020	5927 Maspeth Ave Maspeth, NY 11378				\$1,000.00
#15	James & Mary Weiss	Individual	Retired	Check	
2/12/2020	17667 Boat Club Dr Fort Myers, FI 33908				\$100.00
#16	Joann Villalba	Individual	Retired	Check	
2/11/2020	2805 Hemlock Farms Hawley, Pa 18428				\$200.00
#17	Alberto Rodriguez	Individual	Administrator	Check	
2/12/2020	534 NE 7th Ave Fort Lauderdale, FI 33301				\$200.00
#18	Jenks Builders	Business	Builder	Check	
2/22/2020	7600 Alico Rd Fort Myers, FI 33912				\$500.00
#19	Elizabeth Vaughn	Individual	Ret.Educator/BoardMemb	Check	
2/28/2020	19470 Cromwell Ct Fort Myers, FI 33912				\$150.00
#20	Ricardo Perez	Individual	CollisionSpecialist	Check	
2/28/2020	17675 Boat Club Dr #2 Fort Myers, FL 33908				\$1,000.00
#21	Crystal Johnson	Individual	CommunityAdv.Leader	Check	
2/29/2020	***Protected Voter***				\$20.00
#22	I Stripe	Other	PaymentPlatform	Refund	
5/4/2020	510 Townsend St Suite 900 San Francisco, CA 94103				\$67.23

#23	Frank Mortaldo	Individual	RetiredPolice	Money Order	
7/5/2020	1138 SE 35th St Cape Coral , FI 33904				\$100.00
#24	All Claims Processing	Business	CustomerServ	Check	
6/27/2020	343 Hazelwood Ave S Lehigh Acres, FI 33936				\$25.00
#25	All Claims Processing	Business	CustomerServ	Check	
7/7/2020	343 Hazelwood Ave S Lehigh Acres, FI 33936				\$10.00
#26	Ramie Hall	Individual	Realtor	Check	
7/2/2020	868 Xavier Ave N Fort Myers, FI 33919				\$50.00
#27	Judy Alves	Individual	RetiredAttorney	Check	
6/27/2020	18 Georgetown Fort Myers, FL 33919				\$485.20
#28	Donald Hawk	Individual	Retired	Check	
6/30/2020	1712 Castaway St N Fort Myer, FI 33917				\$200.00
#29	Jacqueline Perez	Candidate	Loan	Cash	
7/15/2020	17675 Boat Club Dr Fort Myers, FL 33908-4467	to Themselves			\$5,000.00
#30	Charles I Yanni	Individual	Retired	Check	
7/16/2020	10412 Yorkstone Dr #603 Bonita Springs, FI 34135				\$25.00
#31	Janice I Petraglia	Individual	Retired	Check	
7/16/2020	1203 N BRANDYWINE CIR Fort Myers , FI 33919				\$25.00
#32	Judy I Greenberger	Individual	Retired	Check	
7/16/2020	14351 Harbor Links Ct 23C Fort Myers, FL 33908				\$100.00
#33	Jason T Boeckman	Individual	Dept ofParks	Check	
7/20/2020	1508 Lilly Pond Court Fort Myers, FL 33901				\$25.00
#34	Judy I Alves	Individual	Returncontribution	Refund	
8/13/2020	18 Georgetown Fort Myers, FL 33919				\$19.52

#35	Kathleen I Mayo	Individual	RetiredLibrarian	Check	
8/1/2020	8955 Forest St. Fort Myers, FL 33907				\$104.15
#36	Donald Hawk	Individual	Retired	Check	
8/26/2020	1712 Castaway St N Fort Myers, FL 33917				\$300.00
#37	Rosario Chavez	Individual	Retired	Check	
8/28/2020	5927 Maspeth Ave Maspeth, NY 11378				\$1,000.00
#38	Qiara Perez	Individual	DEP Stateof Florida	Check	
8/28/2020	17675 Boat Club Dr Fort Myers, FL 33908				\$1,000.00
#39	Rosa Rodriguez	Individual	Retired	Cash	
8/28/2020	4900 Biscayne Dr Apt 20 Naples, FL 34112				\$25.00
#40	Jacqueline Perez	Candidate to Themselves	BusinessOwner	Check	
8/17/2020	17675 Boat Club Dr Fort Myers, FL 33908				\$2,200.00
#41	Grisel Perez	Individual	OfficeManager	Check	
8/21/2020	511 20th St NE Naples, FL 34120				\$31.46
#42	Elizabeth Vaughn	Individual	SchoolBoardMember	Check	
9/10/2020	19470 Cromwell Ct Fort Myers, FL 33912				\$300.00
#43	StoneMakers LLC M Company	Business	Stonework	Check	
9/10/2020	16175 Old US 41 Fort Myers, FL 33912				\$300.00
#44	Louis Navarra	Individual	RetiredEducator	Check	
8/30/2020	18 SE 10th Ave Cape Coral , FL 33990				\$25.00
#45	Matthew Tanner	Individual	TruckBroker	Check	
9/11/2020	8000 NW 74th Ter Tamarac, FL 33321				\$1,000.00
#46	Ruth Veneziano	Individual	Administrator	Check	
9/11/2020	28409 Abruzzo Dr Bonita Springs, FL 34135				\$1,000.00
#47	Amy Veneziano	Individual	PhysicianAssistant	Check	
9/11/2020	19021 Elston Way Estero, FL 33928				\$1,000.00

#48	Michael Dr. I Krill 9845 Roundstone Circle Fort Myers , FL 33967	Individual	Doctor of P.T.	Check	\$1,000.00
9/11/2020					
#49	Debra I Fosselman 10416 Yorkstone Dr Bonita Springs, FL 34135	Individual	Retired	Check	\$500.00
9/2/2020					
#50	James McMenamy 10100 Salisbury Ct Fort Myers, FL 33913	Individual	Realtor	Check	\$100.00
9/9/2020					
#51	Tobler Construction P.O. Box 60264 Fort Myers , FL 33906	Business	Builder	Check	\$200.00
9/11/2020					
#52	Janitz Construction 28443 Del Lago Way Bonita Springs , FL 34135	Business	Builder	Check	\$100.00
9/11/2020					
#53	Frigid Rigid International, In 16181 Old US Fort Myers, FL 33912	Business	BoatCoolerDist	Check	\$1,000.00
9/11/2020					
#54	Rigid Boat Company Inc 16180 Old US 41 Fort Myers , FL 33912	Business	Boat Sales	Check	\$500.00
9/11/2020					
#55	Anthony Capizzi 9180 Paseo De Valencia St Fort Myers , FL 33908	Individual	Manager	Check	\$125.00
9/11/2020					
#56	Mark Frisbie 6451 Morgan La Fee Ln Fort Myers , FL 33912	Individual	FertilizerDistributor	Check	\$1,000.00
9/11/2020					
#57	Karl Landsteiner 6083 Timberwood Cir #315 Fort Myers , FL 33908	Individual	Attorney	Check	\$250.00
9/21/2020					
#58	International Marble Company 16175 Old US 41 Fort Myers, FL 33912	Business	SubContractor	Check	\$1,000.00
9/25/2020					
#59	Jacqueline Perez 17675 Boat Club Dr Fort Myers, FL 33908	Candidate to Themselves	BusinessOwner	Loan	\$3,000.00
9/25/2020					

#60	Ricardo T Perez	Individual	CollisionRev Spec	Check	
10/2/2020	17675 Boat Club Dr Fort Myers, FL 33908				\$500.00
#61	William Hopmann	Individual	Realtor	Check	
10/9/2020	27304 GASPARILLA DR. Bonita Springs, FL 34135				\$100.00
#62	Jacqueline Perez	Candidate	BusinessOwner	Loan	
10/16/2020	17675 Boat Club Dr Fort Myers, FL 33908	to Themselves			\$8,000.00

Total Contributions \$48,472.07

CAMPAIGN TREASURER'S REPORT – IN-KIND CONTRIBUTIONS

Seq#	Contributor	Entity	Occupation	In-Kind Description	Amount
Date			Amend		
#1	Evelio Perez Sr.	Individual	BusinessOwner	Marketing-Business Cards,Banner,Table Space.	
1/12/2020	17675 BOAT CLUB DR Estero, FI 33908				\$111.22
#2	Dave Jaye	Individual	P/TEnglishTeacher	Social Media Ad/Web	
1/23/2020	25810 Hickory Blvd #603 Bonita Springs, FI 34134				\$250.00
#3	IMC ~StoneMakers	Business	Business	Meeting/Office Space	
1/25/2020	16175 Old US 41 FORT MYERS, FL 33912				\$125.00
#4	B IMC ~StoneMakers	Business	Business	Use of Office Space	
2/25/2020	16175 Old US 41 FORT MYERS, FL 33912				\$125.00
#5	B IMC ~	Business	Manufacturing	Office Use.	
3/30/2020	16175 Old US 41 FORT MYERS, FL 33912				\$125.00

#6	Jacqueline IMC	Business	Manufacturing	OFFICE USE	
4/30/2020	16175 OLD US 41 FT. MYERS, FL 33912				\$125.00
#7	Evelio M Perez	Individual	MANUFACTURING	IN KIND CONTRIBUTION FOR ON LINE SOCIAL MEDIA COSTS	
4/26/2020	17675 Boat Club Drive Fort Myers, FL 33908- 4467		Add		\$288.51
#8	Gabriela Perez	Individual	CollegeStudent	Campaign ad and Marketing items.	
7/31/2020	17675 Boat Club Dr Fort Myers, FL 33908- 4467				\$100.00
#9	International Marble Company	Business	Stoneworkcompany	Use of office equipment and office space.	
10/9/2020	16175 Old US 41 Fort Myers, FL 33912				\$300.00

Total In-Kind Contributions **\$1,549.73**

CAMPAIGN TREASURER'S REPORT – ITEMIZED EXPENDITURES

Seq#	Vendor	Purpose	Exp. Type	Amount
Date			Amend	
#1	Stripe Stripe	Fee Transaction Return	Monetary	
1/31/2020	510 Townsend St San Francisco, Fl 94103			\$67.23

#2	Stripe Stripe	Fee	Monetary	
1/21/2020	510 Townsend St San Francisco, FI 94103	Transaction		\$3.56
#3	Stripe Stripe	Fee	Monetary	
1/23/2020	510 Townsend St San Francisco, FI 94103	Transaction		\$2.84
#4	Rebel Idealist LLC	Processing Fees for	Monetary	
2/4/2020	5 3rd Street Suite 900 San Francisco, CA 94103	Donor Box		\$19.25
#5	Stripe	Processing	Monetary	
2/1/2020	510 Townsend St San Francisco, FI 94103	Fee		\$29.30
#6	Stripe Stripe	Fees CC	Monetary	
2/29/2020	510 Townsend St San Francisco, FI 94103			\$23.13
#7	Stripe Stripe	Fees CC	Monetary	
2/29/2020	510 Townsend St San Francisco, FI 94103			\$23.13
#8	Jacqueline ALL	MEDIA	Monetary	
4/9/2020	ACCESS MEDIA 14965 Technology Ct. Suite #6 Fort Myers, FL 33912			\$1,350.00
#9	GO DADDY	ON LINE SOCIAL MEDIA	Monetary	
4/26/2020	14455 North Hayden Road Suite 219 Scottsdale, AZ 85260			\$288.51
#10	Lee County Supervisor	Subscriptions	Monetary	
6/9/2020	Of Elect 2480 Thompson St 3rd Floor Fort Myers, FI 33901			\$110.00
#11	Staples	Stationary Cards	Monetary	
6/5/2020	7191-3 Cypress Lake Drive Fort Myers, FL 33907			\$53.24

#12	Lee County Supervisor Of Lee County	Qualifying Fee	Monetary	
6/12/2020	Supervisor Of Elect 2480 Thompson St 3rd Floor Fort Myers, FI 33901			\$1,724.24
#13	Stripe Stripe	refund	Monetary	
5/4/2020	510 Townsend St San Francisco, FI 94103		Add	\$67.23
#14	Delivery Signs	Signs	Monetary	
6/25/2020	40 W. Crystal Lake St. #100 Orlando, FI 32806			\$2,250.35
#15	Estero Republican Club	Fee	Monetary	
6/26/2020	8570 Kingbird Loop #548 Estero , FI 33967			\$50.00
#16	Vista Print	Cards	Monetary	
6/29/2020	275 Wyman St Waltman, MA 02451			\$457.05
#17	WebElect	Election Information	Monetary	
7/3/2020	10150 Highland Manor Dr #200 Tampa, FI 33610			\$455.00
#18	Vista Print	card	Monetary	
7/6/2020	275 Wyman St Waltman, MA 02451			\$34.99
#19	Staples Direct	Cards/Stationary	Monetary	
7/6/2020	7191-3 Cypress Lake Dr Fort Myers, FI 33907			\$88.91
#20	Vinyl Lettering and Signs	Lettering for Campaign	Monetary	
7/10/2020	5625 Youngquist Rd Fort Myers, FI 33912			\$935.00
#21	Paypal	Fees	Monetary	
7/7/2020	2211 North First Street San Jose, Ca 95131			\$24.85
#22	Florida Mail & Print	Campaign Mail	Monetary	
7/15/2020	6401 Metro Plantation Fort Myers, FI 33966			\$10,159.00

#23	Facebook	Ads	Monetary	
7/17/2020	1 Hacker Way Suite 900 Menlo Park, CA 94025			\$250.00
#24	Facebook	Ads	Monetary	
7/11/2020	1 Hacker Way Suite 900 Menlo Park, CA 94025			\$86.92
#25	VistaPrint	Cards	Monetary	
7/17/2020	95 Hayden Ave Lexington, MA 02421-7942			\$110.29
#26	Delivery Signs	Signs	Monetary	
7/20/2020	40 W Crystal Lake St #100 Orlando, FL 32806			\$426.00
#27	VistaPrint	Campaign materials	Monetary	
7/20/2020	95 Hayden Ave Lexington, MA 02421-7942			\$117.59
#28	Staples	Cards for Campaign	Monetary	
7/20/2020	7191-3 Cypress Lake Drive Fort Myers, FL 33907			\$47.92
#29	USPS	Postage	Monetary	
7/20/2020	PO 112715 Fort Myers, FL 33908			\$625.00
#30	FACEBOOK INC.	Ads	Monetary	
8/4/2020	1 Hacker Way Suite 900 Menlo Park, CA 94025			\$401.63
#31	Google Svc	Svc Charge	Monetary	
8/3/2020	1600 Amphitheatre Parkway Mountain View, Ca 94043			\$3.38
#32	Delivery Signs	signs	Monetary	
8/7/2020	40 W Crystal Lake St #100 Orlando, FL 32806			\$426.00
#33	Delivery Signs	signs	Monetary	
8/7/2020	40 W Crystal Lake St #100 Orlando, FL 32806			\$583.62

#34	Paypal	Fees	Monetary	
8/1/2020	2211 North First Street San Jose, Ca 95131			\$4.35
#35	Adobe	Software for ad design	Monetary	
8/7/2020	345 Park Avenue San Jose, Ca 95110			\$20.99
#36	Adobe	refund of software	Refund	
8/10/2020	345 Park Avenue San Jose, Ca 95110			\$20.99
#37	FACEBOOK INC.	Social Media Ads	Monetary	
8/16/2020	1 Hacker Way Suite 900 Menlo Park, CA 94025			\$600.00
#38	Florida Mail & Print	Mailers	Monetary	
8/19/2020	6401 Metro Plantation Fort Myers, FI 33966			\$3,810.06
#39	Google LLC	Ads	Monetary	
8/24/2020	1600 Amphitheatre Parkway Mountain View, CA 94043			\$295.63
#40	Stripe Stripe	Fee	Monetary	
8/21/2020	510 Townsend St San Francisco, FI 94103			\$1.68
#41	Regions	Bank Fees	Monetary	
8/24/2020	15051 South Tamiami Trail Fort Myers, FI 33908			\$36.00
#42	Zoom .US	Internet Meeting	Monetary	
9/10/2020	55 Almaden Boulevard 6th Floor San Jose, CA 95113			\$16.34
#43	FACEBOOK INC.	Ads	Monetary	
8/31/2020	1 Hacker Way Suite 900 Menlo Park, CA 94025			\$330.83
#44	Constant Contact	Ad contact service	Monetary	
9/16/2020	1601 Trapelo Road Reservoir Place Waltman, Ma 02451			\$45.00
#45	VistaPrint	Cards	Monetary	
9/17/2020	95 Hayden Ave Lexington, MA 02421- 7942			\$202.96

#46	Allied Shirts	T-Shirts	Monetary	
9/17/2020	11525 Stonehollow Dr #100 Austin, TX 78758			\$238.43
#47	Google LLC	Ads	Monetary	
9/23/2020	1600 Amphitheatre Parkway Mountain View, CA 94043			\$336.07
#48	Florida Mail & Print	Cards	Monetary	
9/14/2020	6401 Metro Plantation Fort Myers, FI 33966			\$164.01
#49	Paypal	Service Fee	Monetary	
9/25/2020	2211 North First Street San Jose, Ca 95131			\$7.55
#50	FACEBOOK	Ads	Monetary	
9/30/2020	1 Hacker Way Suite 900 Menlo Park, CA 94025			\$131.53
#51	WebElect	Voter information.	Monetary	
10/7/2020	10150 Highland Manor Dr #200 Tampa, FI 33610			\$87.55
#52	Florida Mail & Print	Mailers.	Monetary	
10/7/2020	6401 Metro Plantation Fort Myers, FI 33966			\$11,825.08
#53	Lee County Supervisor	Voter information.	Monetary	
10/9/2020	Of Of Elect 2480 Thompson St 3rd Floor Fort Myers, FI 33901			\$75.00
#54	Paypal	Service fee.	Monetary	
10/9/2020	2211 North First Street San Jose, Ca 95131			\$3.20
#55	Zoom .US	Campaign	Monetary	
10/16/2020	55 Almaden Boulevard 6th Floor San Jose, CA 95113	Communication Ad		\$16.34
#56	Constant Contact	Campaign Emails Ads	Monetary	
10/13/2020	1601 Trapelo Road Reservoir Place Waltman, Ma 02451			\$45.00

#57	Delivery Signs	Signs	Monetary	
10/14/2020	40 W Crystal Lake St #100 Orlando, FL 32806			\$1,386.63
#58	Florida Restaurant & Lodging	Campaign Event	Monetary	
10/14/2020	230 South Adams St. Second Floor Suite 200 Tallahassee, FL 32301			\$45.70
#59	Tm Strategic Consulting	Ads	Monetary	
10/29/2020	1375 Jackson Street Suite 202 Fort Myers , FL 33901			\$3,540.00
#60	FACEBOOK	Facebook Ads	Monetary	
10/30/2020	1 Hacker Way Suite 900 Menlo Park, CA 94025			\$767.81
#61	Ricardo Perez	Refund	Monetary	
10/30/2020	17675 BOAT CLUB DR FORT MYERS, FL 33908			\$500.00
#62	FACEBOOK	Facebook Ads	Monetary	
11/30/2020	1 Hacker Way Suite 900 Menlo Park, CA 94025			\$104.31
#63	Constant Contact	Email Service	Monetary	
12/10/2020	1601 Trapelo Road Reservoir Place Waltman, Ma 02451			\$45.00
#64	Constant Contact	Email service	Monetary	
1/10/2021	1601 Trapelo Road Reservoir Place Waltman, Ma 02451			\$45.00
#65	Jacqueline Edith Perez	Repayment Loan	Monetary	
1/31/2021	17675 BOAT CLUB DR FORT MYERS, FL 33908-4467			\$5,002.39
Total Expenditures				\$51,046.59

CAMPAIGN TREASURER'S REPORT – FUND TRANSFERS

Seq#	Institution	Transfer Type	Nature of Account	
Date			Amend	Amount

CAMPAIGN TREASURER'S REPORT – DISTRIBUTIONS

Seq#	Vendor	Purpose	Expenditure Related Exp.	
Date			Amend	Amount

* Petty cash expenditures are realized when the funds are withdrawn for petty cash. Therefore, the referenced item is not included in the total.

**TOMMY DOYLE
SUPERVISOR OF ELECTIONS
LEE COUNTY—FLORIDA**

<u>PHYSICAL ADDRESS</u> LEE COUNTY CONSTITUTIONAL COMPLEX 2480 THOMPSON STREET 3 RD FLOOR FORT MYERS FL 33901	<u>MAILING ADDRESS</u> please send all correspondence to this address P O BOX 2545 FORT MYERS FL 33902-2545
MAIN OFFICE 239 LEE VOTE or 239-533-8683	FAX 239-533-6310 WEBSITE www.lee.vote

NOTIFICATION OF LATE FILING

TO: Mrs. JACQUELINE PEREZ
17675 BOAT CLUB DR
FORT MYERS, FL 33908
SCHOOL BOARD 3

FROM: Cheryl Futch, Qualifying Officer

DATE: July 7, 2020

RE: 20P2 Campaign Treasurer's Report

DUE: 7/6/2020

The campaign treasurer's report 20P2, which was due 7/6/2020, has not been received.

Section 106.07(8)(b), Florida Statutes, requires that the filing officer notify the candidate or chairperson of a political committee of the failure to file this report and that a fine will be assessed of \$50 per day for the first 3 days late and, thereafter \$500 per day, although a fine cannot exceed 25% of the total receipts or expenditures, whichever is greater, for the period covered by the late report. However, for reports immediately preceding each primary or general election, the fine shall be \$500 per day for each day late, not to exceed 25% of the total receipts or expenditures, whichever is greater, for the period covered by the late report.

Once the report is filed, this office will notify the candidate or political committee of the specific amount of the fine. Fines must be paid to the filing officer within 20 days of receipt of the payment due notice. Please be advised, however, that failure to file a campaign treasurer's report may constitute a violation of Chapter 106, Florida Statutes, independent of the automatic fine violation referenced above. Therefore, if you fail to file a report, this office will turn the matter over to the Florida Elections Commission. Section 106.265(1), Florida Statutes, authorizes the Florida Elections Commission to impose a civil penalty up to \$1,000 per count for each willful violation of Chapter 106.

If you have any questions, do not hesitate to contact me at 239-533-6311 or email cfutch@lee.vote.

**TOMMY DOYLE
SUPERVISOR OF ELECTIONS
LEE COUNTY—FLORIDA**

<u>PHYSICAL ADDRESS</u> LEE COUNTY CONSTITUTIONAL COMPLEX 2480 THOMPSON STREET 3 RD FLOOR FORT MYERS FL 33901	<u>MAILING ADDRESS</u> please send all correspondence to this address P O BOX 2545 FORT MYERS FL 33902-2545
MAIN OFFICE 239 LEE VOTE or 239-533-8683	FAX 239-533-6310 WEBSITE www.lee.vote

FINE PAYMENT RECEIVED

TO : Jacqueline Perez, Candidate 17675 Boat Club Dr., Fort Myers, FL 33908
School Board - 3

FROM : Tammy Lipa, Administration Support Specialist

DATE : July 20, 2020

RE : 20-P2 Campaign Treasurer's Report
DUE: 07/06/2020
FINE: \$50.00

The Lee County Supervisor of Elections has received payment in the amount of \$50.00 for the fine assessed for the late filing of the 20-P2 campaign treasurer's report. The fine is paid in full.

Thank you for your cooperation in this matter.

If you have any questions, do not hesitate to contact me at 239-533-6329 or email tlipa@lee.vote.

**TOMMY DOYLE
SUPERVISOR OF ELECTIONS
LEE COUNTY—FLORIDA**

<u>PHYSICAL ADDRESS</u> LEE COUNTY CONSTITUTIONAL COMPLEX 2480 THOMPSON STREET 3 RD FLOOR FORT MYERS FL 33901	<u>MAILING ADDRESS</u> please send all correspondence to this address P O BOX 2545 FORT MYERS FL 33902-2545
MAIN OFFICE 239 LEE VOTE or 239-533-8683	FAX 239-533-6310 WEBSITE www.lee.vote

NOTICE OF AUTOMATIC FINE

TO: Mrs. JACQUELINE PEREZ
17675 BOAT CLUB DR
FORT MYERS, FL 33908
SCHOOL BOARD 3

FROM: Cheryl Futch, Qualifying Officer

DATE: October 31, 2020

RE: 20G7 Campaign Treasurer's Report

DUE: 10/30/2020

FINE: \$500.00

The campaign treasurer's report 20G7, that was due 10/30/2020 was not filed until 10/31/2020.

Accordingly, you are fined in the amount of \$500.00 (1 day at \$500 per day). The fine must be paid, from personal funds, to Lee County Supervisor of Elections within 20 days of receipt of this notice unless appealed to the Florida Elections Commission.

If you wish to appeal the fine, you must submit a notice of appeal to the Commission within 20 days of the date of receipt of this notice. (See Rules 2b-1.005, 2b-1.0052 and 2b-1.0055, Florida Administrative Code.) The Florida Elections Commission's address is 107 West Gaines Street, Suite 224, Tallahassee, FL 32399-0100.

If you appeal the fine, please send a copy of your notice of appeal to the Lee County Supervisor of Elections, P. O. Box 2545, Fort Myers, FL 33902-2545.

If you have any questions, do not hesitate to contact me at 239-533-6329 or email cfutch@lee.vote.

**TOMMY DOYLE
SUPERVISOR OF ELECTIONS
LEE COUNTY—FLORIDA**

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MAIN OFFICE 239 LEE VOTE or 239-533-8683	FAX 239-533-6310 WEBSITE www.lee.vote

FINE PAYMENT RECEIVED

TO : Jacqueline Perez, Candidate 17675 Boat Club Dr., Fort Myers, FL 33908
School Board - 3

FROM : Cheryl Futch, Qualifying Officer

DATE : November 20, 2020

RE : 20-G7 Campaign Treasurer's
Report DUE: 10/30/2020
FINE: \$500.00

The Lee County Supervisor of Elections has received payment in the amount of \$500.00 for the fine assessed for the late filing of the 20-G7 campaign treasurer's report. The fine is paid in full.

Thank you for your cooperation in this matter.

If you have any questions, do not hesitate to contact me at 239-533-6311 or email cfutch@lee.vote.

**TOMMY DOYLE
SUPERVISOR OF ELECTIONS
LEE COUNTY—FLORIDA**

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NOTIFICATION OF INCOMPLETE REPORT FILING

TO : Jacqueline Perez, Candidate 17675 Boat Club Dr., Fort Myers, FL 33908
Lee County School Board District 3

FROM : Cheryl Futch, Qualifying Officer

DATE : February 2, 2021

RE : 20-TRG, Campaign Treasurer's Report
DUE: February 1, 2021

The Lee County Supervisor of Elections office has determined that one or more campaign reports are incomplete for the reasons noted in the attached error report.

Your campaign is out of balance \$2,574.52

JACQUELINE PEREZ (NON)	(Active-DEFEATED)	\$48,472.07	\$1,549.73	\$51,046.59
------------------------	-------------------	-------------	------------	-------------

Pursuant to Section 106.07 (2), Florida Statutes, you have 7 days from the receipt of this notice to file an amended report to correct errors or provide missing information. If the information has been reported accurately, provide a written explanation to the Supervisor of Elections office addressing the issue noted in the error report. Please be advised that failure to supply this information within the time allowed may constitute a violation of Chapter 106, Florida Statutes.

If you have any questions, do not hesitate to contact me at 239-533-6311 or email cfutch@lee.vote.

Attachment



Package
US Airbill

FedEx
Tracking
Number

8095 2276 1774

Form
ID No

0200

1 From Please print and press hard.

Date 2-2-21

Sender's Name Cheryl Futch Phone 239, 533-6311

Company Lee Co Supervisor of Elections

Address 2486 Thompson St 3rd FL
Dept./Floor/Suite/Room

City Fort Myers State FL ZIP 33901

2 Your Internal Billing Reference

First 24 characters will appear on invoice.

3 To Recipient's Name Jacqueline Perez Phone 239, 878-2200

Company _____

Address 17675 Boat Club Dr
We cannot deliver to P.O. boxes or P.O. ZIP codes. Dept./Floor/Suite/Room

Address _____
Use this line for the HOLD location address or for continuation of your shipping address.

City Fort Myers State FL ZIP 33908

Express Package Service

* To most locations.

Packages up to 150 lbs.
For packages over 150 lbs., use the
FedEx Express Freight US Airbill.

Next Business Day

- ☐ FedEx First Overnight
Earliest next business morning delivery to select locations. Friday shipments will be delivered on Monday unless Saturday Delivery is selected.
- ☐ FedEx Priority Overnight
Next business morning.* Friday shipments will be delivered on Monday unless Saturday Delivery is selected.
- ☒ FedEx Standard Overnight
Next business afternoon.* Saturday Delivery NOT available.

2 or 3 Business Days

- ☐ FedEx 2Day A.M.
Second business morning.* Saturday Delivery NOT available.
- ☐ FedEx 2Day
Second business afternoon.* Thursday shipments will be delivered on Monday unless Saturday Delivery is selected.
- ☐ FedEx Express Saver
Third business day.* Saturday Delivery NOT available.

5 Packaging *Declared value limit \$500.

- ☒ FedEx Envelope* ☐ FedEx Pak* ☐ FedEx Box ☐ FedEx Tube ☐ Other

6 Special Handling and Delivery Signature Options Fees may apply. See the FedEx Service Guide.

- ☐ Saturday Delivery
NOT available for FedEx Standard Overnight, FedEx 2Day A.M., or FedEx Express Saver.

- ☒ No Signature Required
Package may be left without obtaining a signature for delivery.
- ☐ Direct Signature
Someone at recipient's address may sign for delivery.
- ☐ Indirect Signature
If no one is available at recipient's address, someone at a neighboring address may sign for delivery. For residential deliveries only.

Does this shipment contain dangerous goods?

- One box must be checked.
- ☒ No ☐ Yes
As per attached Shipper's Declaration.
- ☐ Yes
Shipper's Declaration not required.
- ☐ Dry Ice
Dry Ice, 9 UN 1845 _____ x _____ kg
- Restrictions apply for dangerous goods — see the current FedEx Service Guide. ☐ Cargo Aircraft Only

7 Payment Bill to:

- Enter FedEx Acct. No. or Credit Card No. below.
- ☒ Sender
Acct. No. in Section 1 will be billed.
- ☐ Recipient ☐ Third Party ☐ Credit Card ☐ Cash/Check
- FedEx Acct. No. _____ Exp. Date _____
Credit Card No. _____

Total Packages _____ Total Weight _____ Total Declared Value†

†Our liability is limited to US\$100 unless you declare a higher value. See back for details. By using this airbill you agree to the service conditions on the back of this airbill and in the current FedEx Service Guide, including terms that limit our liability.
Rev. Date 3/15 • Part #167002 • ©2012–2015 FedEx • PRINTED IN U.S.A. SRF



Leave the packing to the pros at FedEx Office.
Go to fedex.com/office.

644

PLEASE REMAIN THIS COPY BEFORE ATTACHING TO THE PACKAGE. NO POSTAGE NEEDED.



February 03, 2021

Dear Customer,

The following is the proof-of-delivery for tracking number: 809522761774

Delivery Information:			
Status:	Delivered	Delivered To:	Residence
Signed for by:	Signature not required	Delivery Location:	
Service type:	FedEx Standard Overnight		
Special Handling:	Deliver Weekday; Residential Delivery		FL,
		Delivery date:	Feb 3, 2021 15:32
Shipping Information:			
Tracking number:	809522761774	Ship Date:	Feb 2, 2021
		Weight:	
Recipient:		Shipper:	
FL, US,		F M, US,	

Proof-of-delivery details appear below; however, no signature is available for this FedEx Express shipment because a signature was not required.

Thank you for choosing FedEx



Cheryl Futch <cfutch@lee.vote>

FedEx Shipment 809522761774: Your package has been delivered

1 message

TrackingUpdates@fedex.com <TrackingUpdates@fedex.com>

Wed, Feb 3, 2021 at 3:32 PM

Reply-To: trackingmail@fedex.com

To: cfutch@lee.vote



Hi. Your package was
delivered Wed, 02/03/2021 at
3:32pm.

**OBTAIN PROOF OF DELIVERY****TRACKING NUMBER** 809522761774**FROM** F M, US**TO** , FL, US**SHIP DATE** Tue 2/02/2021 06:52 PM**DELIVERED TO** Residence

2/11/2021

Lee County Elections Mail - FedEx Shipment 809522761774: Your package has been delivered

PACKAGING TYPE FedEx Envelope


ORIGIN F M, , US

SPECIAL HANDLING Deliver Weekday
Residential Delivery

SERVICE TYPE FedEx Standard Overnight

FOLLOW FEDEX



 Please do not respond to this message. This email was sent from an unattended mailbox.
This report was generated at approximately 2:32 PM CST 02/03/2021.

All weights are estimated.

To track the latest status of your shipment, click on the tracking number above.

Standard transit is the date and time the package is scheduled to be delivered by, based on the selected service, destination and ship date. Limitations and exceptions may apply. Please see the FedEx Service Guide for terms and conditions of service, including the FedEx Money-Back Guarantee, or contact your FedEx Customer Support representative.

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Thank you for your business.



Cheryl Futch <cfutch@lee.vote>

Re: Report Submitted: JACQUELINE PEREZ - SCHOOL BOARD-3 (2021-02-01)

1 message

Cheryl Futch <cfutch@lee.vote>

Tue, Feb 2, 2021 at 8:54 AM

To: Jacqueline Perez <jacquelineschooldistrict3@gmail.com>, JACQUELINE PEREZ <intmarco9@yahoo.com>

Cc: TAMMY LIPA <tlipa@lee.vote>

Hello Jacqueline,

Please see the attached letter in reference to your Incomplete Report.

I have also attached the

If you have any questions or concerns please let me know.

Yours truly,

Cheryl Futch

Qualifying Officer

Lee County Supervisor of Elections

PO Box 2545

Ft Myers FL 33902

Main Number: 239-533-8683

Direct Number: 239-533-6311

Fax Number: 239-533-6310

cfutch@lee.vote

Visit our website: www.lee.vote

Under Florida law, email addresses are public records. If you do not want your email address

released in response to a public-records request, do not send electronic mail to this entity.

Instead, contact this office by phone or in writing.

On Mon, Feb 1, 2021 at 10:25 PM Candidate Financial <CFinance@vrsystems.com> wrote:

Note: This is an Automated Email from the Campaign Finance System. This email is sent from an email address that is not monitored -- If you wish to communicate with the reporting entity, please "Forward" this email to the reporter's email address. Using a "Reply To" message will not reach them.

2/11/2021

Lee County Elections Mail - Re: Report Submitted: JACQUELINE PEREZ - SCHOOL BOARD-3 (2021-02-01)

JACQUELINE PEREZ - (lee) Candidate for SCHOOL BOARD-3 has submitted a financial report (2021-02-01 - Confirmation #1243130). Click here to log in : https://www.voterfocus.com/CampaignFinance/cf_cpanel.php

2 attachments

 **jacqueline perez_ TRG Incomplete Report Notice_020221.pdf**
437K

 **2020 CFR Guidebook.pdf**
4882K

TOMMY DOYLE
SUPERVISOR OF ELECTIONS
LEE COUNTY—FLORIDA

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NOTIFICATION OF INCOMPLETE REPORT FILING

TO : Jacqueline Perez, Candidate 17675 Boat Club Dr., Fort Myers, FL 33908
Lee County School Board District 3

FROM : Cheryl Futch, Qualifying Officer

DATE : February 2, 2021

RE : 20-TRG, Campaign Treasurer's Report
DUE: February 1, 2021

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Your campaign is out of balance \$2,574.52

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If you have any questions, do not hesitate to contact me at 239-533-6311 or email cfutch@lee.vote.

Attachment



Cheryl Futch <cfutch@lee.vote>

Report Error - TRG [PEREZ]

1 message

Tammy Lipa <tlipa@lee.vote>
To: Jacqueline Perez <Jacquelineschooldistrict3@gmail.com>
Cc: Cheryl Futch <cfutch@lee.vote>

Tue, Feb 9, 2021 at 9:32 AM

Hello Jacqueline,

Your recently filed amendment has been rejected.

An amended report should only report transactions that are being amended.
Please refer to the attached CFR Guidebook for instructions on the correct way to submit an amended report.

Thank you,

Tammy Lipa
Administration Support Specialist
Post Office Box 2545
Fort Myers, FL 33902-2545

Main Number: 239-533-8683

Direct Number: 239-533-6329

tlipa@lee.vote

Visit our website: **www.lee.vote**

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2020 CFR Guidebook.pdf
4876K



Cheryl Futch <cfutch@lee.vote>

Re: Report Error - TRG [PEREZ]

1 message

Tammy Lipa <tlipa@lee.vote>

Tue, Feb 9, 2021 at 11:13 AM

To: Jacqueline Perez <jacquelineschooldistrict3@gmail.com>

Cc: Cheryl Futch <cfutch@lee.vote>

Thank you for responding.

Please take care and feel better.

Tammy Lipa

Administration Support Specialist

Post Office Box 2545

Fort Myers, FL 33902-2545

Main Number: 239-533-8683

Direct Number: 239-533-6329

tlipa@lee.voteVisit our website: www.lee.vote

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On Tue, Feb 9, 2021 at 11:11 AM Jacqueline Perez <jacquelineschooldistrict3@gmail.com> wrote:

Omg I am so sorry. I've been fighting covid symptoms. I will do within the next couple of hours. I am so so sorry.

Sent from my iPhone

On Feb 9, 2021, at 9:33 AM, Tammy Lipa <tlipa@lee.vote> wrote:

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Cheryl Futch <cfutch@lee.vote>

Re: Report Error - TRG [PEREZ]

1 message

Cheryl Futch <cfutch@lee.vote>

Tue, Feb 9, 2021 at 5:00 PM

To: Jacqueline Perez <jacquelineschooldistrict3@gmail.com>, JACQUELINE PEREZ <intmarco9@yahoo.com>

Cc: TAMMY LIPA <tlipa@lee.vote>

Hello Jacqueline,

You are over in your in your expenditures. The amendments you are filling are putting you over even further. You need to review all of your campaign reports submitted electronically against your bank statements and correct any necessary reports.

Yours truly,

Cheryl Futch

On Tue, Feb 9, 2021, 4:52 PM Tammy Lipa <tlipa@lee.vote> wrote:

Tammy Lipa

Administration Support Specialist

Post Office Box 2545

Fort Myers, FL 33902-2545

Main Number: 239-533-8683

Direct Number: 239-533-6329

tlipa@lee.voteVisit our website: **www.lee.vote**

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----- Forwarded message -----

From: **Jacqueline Perez** <jacquelineschooldistrict3@gmail.com>

Date: Tue, Feb 9, 2021 at 4:39 PM

Subject: Re: Report Error - TRG [PEREZ]

To: Tammy Lipa <tlipa@lee.vote>

Please let me know if I did it correctly Thank you for your patience

On Tue, Feb 9, 2021 at 11:14 AM Tammy Lipa <tlipa@lee.vote> wrote:

Thank you for responding.

Please take care and feel better.

Tammy Lipa

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Cheryl Futch <cfutch@lee.vote>

Re: Report Error - TRG [PEREZ]

1 message

jacqueline e <intmarco9@yahoo.com>

Tue, Feb 9, 2021 at 5:07 PM

To: Cheryl Futch <cfutch@lee.vote>, TAMMY LIPA <tlipa@lee.vote>

Tammy and Cheryl

I will have to go month to month. I have been so sick for the past few weeks and just starting to feel better. I beg for another day I will have to give this to my accountant to correct if I cannot figure it out. I will work on it all night and see if I can find any errors. The majority of the funds have been from my own funds. Could it be the in kind ? I know I have not done anything illegal and never would. Please advise on how I should review this. Should I start from the first month and reconcile from there and put through quickbooks?

Jacqueline

On Tuesday, February 9, 2021, 05:00:30 PM EST, Cheryl Futch <cfutch@lee.vote> wrote:

Hello Jacqueline,

You are over in your expenditures. The amendments you are filling are putting you over even further. You need to review all of your campaign reports submitted electronically against your bank statements and correct any necessary reports.

Yours truly,

Cheryl Futch

On Tue, Feb 9, 2021, 4:52 PM Tammy Lipa <tlipa@lee.vote> wrote:

Tammy Lipa

Administration Support Specialist

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Fort Myers, FL 33902-2545

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tlipa@lee.voteVisit our website: **www.lee.vote**

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From: **Jacqueline Perez** <jacquelineschooldistrict3@gmail.com>

Date: Tue, Feb 9, 2021 at 4:39 PM

Subject: Re: Report Error - TRG [PEREZ]

To: Tammy Lipa <tlipa@lee.vote>

Please let me know if I did it correctly Thank you for your patience

On Tue, Feb 9, 2021 at 11:14 AM Tammy Lipa <tlipa@lee.vote> wrote:
'Thank you for responding.

Please take care and feel better.

Tammy Lipa

Administration Support Specialist
Post Office Box 2545
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2/11/2021

Lee County Elections Mail - Re: Report Error - TRG [PEREZ]



Cheryl Futch <cfutch@lee.vote>

Re: Report Error - TRG [PEREZ]

1 message

Jacqueline Perez <jacquelineschooldistrict3@gmail.com>

Tue, Feb 9, 2021 at 5:08 PM

To: Cheryl Futch <cfutch@lee.vote>

Okay I will start right now. I will find it. Thank you

You answered my question. That makes sense. If I find the error Cheryl and it is early on, do I amend at the end or amend that month?

On Tue, Feb 9, 2021 at 5:00 PM Cheryl Futch <cfutch@lee.vote> wrote:

Hello Jacqueline,

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Yours truly,

Cheryl Futch

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Tammy Lipa

Administration Support Specialist

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Fort Myers, FL 33902-2545

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Direct Number: 239-533-6329

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Cheryl Futch <cfutch@lee.vote>

Re: Report Error - TRG [PEREZ]

1 message

Cheryl Futch <cfutch@lee.vote>

Tue, Feb 9, 2021 at 5:11 PM

To: Jacqueline Perez <jacquelineschooldistrict3@gmail.com>

Cc: TAMMY LIPA <tlipa@lee.vote>

You will amend the report the error is located in.

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Subject: Re: Report Error - TRG [PEREZ]

To: Tammy Lipa <tlipa@lee.vote>

Please let me know if I did it correctly Thank you for your patience

On Tue, Feb 9, 2021 at 11:14 AM Tammy Lipa <tlipa@lee.vote> wrote:

Thank you for responding.

Please take care and feel better.

Tammy Lipa

Administration Support Specialist
Post Office Box 2545
Fort Myers, FL 33902-2545

Main Number: 239-533-8683

Direct Number: 239-533-6329

tlipa@lee.vote

Visit our website: **www.lee.vote**

Under Florida law, email addresses are public records. If you do not want your email address released in response to a public-records request, do not send electronic email to this entity. Instead, contact this office by phone or in writing.

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Cheryl Futch <cfutch@lee.vote>

Re: Report Error - TRG [PEREZ]

1 message

Jacqueline Perez <jacquelineschooldistrict3@gmail.com>
To: Cheryl Futch <cfutch@lee.vote>

Tue, Feb 9, 2021 at 5:34 PM

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2/11/2021

Lee County Elections Mail - Re: Report Error - TRG [PEREZ]



Cheryl Futch <cfutch@lee.vote>

Re: Report Error - TRG [PEREZ]

1 message

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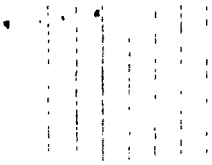
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2/11/2021

Lee County Elections Mail - Re: Report Error - TRG [PEREZ]



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Wed, Feb 10, 2021 at 12:38 AM

To: Cheryl Futch <cfutch@lee.vote>

It does not allow me to amend for a September Deposit it only allows me to unlock

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2/11/2021

Lee County Elections Mail - Re: Report Error - TRG [PEREZ]

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Cheryl Futch <cfutch@lee.vote>

Re: Report Error - TRG [PEREZ]

1 message

Cheryl Futch <cfutch@lee.vote>

Wed, Feb 10, 2021 at 7:03 AM

To: Jacqueline Perez <jacquelineschooldistrict3@gmail.com>

Yes, it will, please follow the instructions in the CFR Guidebook. No report is unable to be amended.

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2/11/2021

Lee County Elections Mail - Re: Report Error - TRG [PEREZ]

Direct Number: 239-533-6329

tlipa@lee.vote

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Cheryl Futch <cfutch@lee.vote>

Re: Report Submitted: JACQUELINE PEREZ - SCHOOL BOARD-3 (2021-02-01)

1 message

Cheryl Futch <cfutch@lee.vote>

Thu, Feb 11, 2021 at 8:19 AM

To: Jacqueline Perez <jacquelineschooldistrict3@gmail.com>, JACQUELINE PEREZ <intmarco9@yahoo.com>

Cc: TAMMY LIPA <tlipa@lee.vote>

Hello Jacqueline,

I have rejected both of your most recently submitted reports. Prior to these newly submitted reports, you were over in your expenditures. Both of the new reports added to your expenditures and would have put you over further. Please follow this link to see all of your reports https://www.voterfocus.com/CampaignFinance/candidate_pr.php?el=24&c=lee. In addition, you are past the acceptable deadline to avoid being reported to the Florida Election Commission, I urge you to continue to find the error in your reporting and amend what is necessary to get your campaign account in balance.

Yours truly,

Cheryl Futch

Qualifying Officer

Lee County Supervisor of Elections

PO Box 2545

Ft Myers FL 33902

Main Number: 239-533-8683

Direct Number: 239-533-6311

Fax Number: 239-533-6310

cfutch@lee.vote

Visit our website: www.lee.vote

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On Wed, Feb 10, 2021 at 8:15 AM Cheryl Futch <cfutch@lee.vote> wrote:

Hello Jacqueline,

Just a reminder your balanced amended report/s must be submitted by midnight tonight to avoid being reported to the Florida Election Commission.

Yours truly,

Cheryl Futch

Qualifying Officer

Lee County Supervisor of Elections

PO Box 2545

Ft Myers FL 33902

Main Number: 239-533-8683

Direct Number: 239-533-6311

Fax Number: 239-533-6310

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On Tue, Feb 2, 2021 at 8:54 AM Cheryl Futch <cfutch@lee.vote> wrote:
Hello Jacqueline,

Please see the attached letter in reference to your Incomplete Report.

I have also attached the

If you have any questions or concerns please let me know.

Yours truly,

Cheryl Futch

Qualifying Officer

Lee County Supervisor of Elections

PO Box 2545

Ft Myers FL 33902

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On Mon, Feb 1, 2021 at 10:25 PM Candidate Financial <CFinance@vrsystems.com> wrote:

Note: This is an Automated Email from the Campaign Finance System. This email is sent from an email address that is not monitored -- If you wish to communicate with the reporting entity, please "Forward" this email to the reporter's email address. Using a "Reply To" message will not reach them.

JACQUELINE PEREZ - (lee) Candidate for SCHOOL BOARD-3 has submitted a financial report (2021-02-01 - Confirmation #1243130). Click here to log in : https://www.voterfocus.com/CampaignFinance/cf_cpanel.php

2 attachments



jacqueline perez_ TRG Incomplete Report Notice_020221.pdf
437K



2020 CFR Guidebook.pdf
4882K

**TOMMY DOYLE
SUPERVISOR OF ELECTIONS
LEE COUNTY—FLORIDA**

<u>PHYSICAL ADDRESS</u> LEE COUNTY CONSTITUTIONAL COMPLEX 2480 THOMPSON STREET 3 RD FLOOR FORT MYERS FL 33901	<u>MAILING ADDRESS</u> please send all correspondence to this address P O BOX 2545 FORT MYERS FL 33902-2545
MAIN OFFICE 239 LEE VOTE or 239-533-8683	FAX 239-533-6310 WEBSITE www.lee.vote

NOTIFICATION OF INCOMPLETE REPORT FILING

TO : Jacqueline Perez, Candidate 17675 Boat Club Dr., Fort Myers, FL 33908
Lee County School Board District 3

FROM : Cheryl Futch, Qualifying Officer

DATE : February 2, 2021

RE : 20-TRG, Campaign Treasurer's Report
DUE: February 1, 2021

The Lee County Supervisor of Elections office has determined that one or more campaign reports are incomplete for the reasons noted in the attached error report.

Your campaign is out of balance \$2,574.52

JACQUELINE PEREZ (NON)	(Active-DEFEATED)	\$48,472.07	\$1,549.73	\$51,046.59
-------------------------------	-------------------	-------------	------------	-------------

Pursuant to Section 106.07 (2), Florida Statutes, you have 7 days from the receipt of this notice to file an amended report to correct errors or provide missing information. If the information has been reported accurately, provide a written explanation to the Supervisor of Elections office addressing the issue noted in the error report. Please be advised that failure to supply this information within the time allowed may constitute a violation of Chapter 106, Florida Statutes.

If you have any questions, do not hesitate to contact me at 239-533-6311 or email cfutch@lee.vote.

Attachment

You are here... Home (/) > Filer > Manage (/Filer/Manage/1562)

Filer Record Maintenance (Cand Types)

Selected Filer

VRID

1562

Name

PEREZ, JACQUELINE (/Filer/Manage/1562)

Election/Group

(2020) 2020 CANDIDATES (11/3/2020)

Office

SCHOOL BOARD 3

Party

NON

Status

Active ☒

Incumbent ☐

Status

Defeated (D) ▼

CFS Public Reports View

CFS Admin. Filer Reports

CFS Admin. Filer Update

CFS Admin. Filer Log

Add File (/Filer/AttachFile?filerId=1562)

Print Label (/Printing/PrintLabel?filerId=1562)

Files (/FileAttachments/Files/1562)

Activity Log (/Filer/FilerLog?filerId=1562)

FEC Report Summary Letter (/Filer/FecLetterMerge?vrid=1562)

Back ◀

- Filer
- Treasurer/Deputy
- Change Log
- Conversations
- Letters
- Forms Received
- Reports
- Emails

Conversations

Add Conversation (/Filer/ConversationEdit/0?filerId=1562)

7/16/2021

Cheryl Futch

20P2 (2020) Orig

Edit

Called and left a message for Jacqueline reminding her she has an unpaid fine.

2/10/2021

Cheryl Futch

TRG (2021) Orig

Edit

Jacqueline is looking for her error and said she could not find an error for the exact amount she was off. I told her that it might be more than one error. She stated that makes sense. She talked about doing a spreadsheet of all her transactions. I suggested she compare her bank statements to the reports she filed because they should match just like a check register would. She said that makes sense. She asked about in-kind contributions. I told her in-kind contributions do not affect the contributions and expenditure totals unless they were recorded incorrectly. She said that makes sense.



TOMMY DOYLE, SUPERVISOR OF ELECTIONS

TRG REPORT



Qualifying Department Call Log

P.O. BOX 2545 - FORT MYERS, FL 33902
(239) LEE-VOTE (239) 533-8683

www.lee.vote

Date	Time	Name	Phone Number	Message
01/20/21	9:09 AM	Jacqueline Perez		text message
01/20/21	9:09 AM	Juan Gonzalez		text message
01/20/21	9:09 AM	Joseph Congero		text message
01/20/21	9:09 AM	Todd Truax		text message
01/20/21	9:09 AM	Matt Caldwell		text message
01/20/21	9:09 AM	Melissa Giovanelli		text message
01/20/21	9:09 AM	Chris Patricca		text message
01/20/21	9:09 AM	Kathy Bridge-Liles		text message
01/20/21	9:09 AM	Melissa Barry		text message

TOMMY DOYLE, SUPERVISOR OF ELECTIONS

TRG REPORT



Qualifying Department Call Log

P.O. BOX 2545 - FORT MYERS, FL 33902
(239) LEE-VOTE (239) 533-8683

www.lee.vote

Date	Time	Name	Phone Number	Message
01/26/21	9:10 AM	Jacqueline Perez		text message
01/26/21	9:10 AM	Juan Gonzalez		text message
01/26/21	9:10 AM	Joseph Congero		text message
01/26/21	9:10 AM	Todd Truax		text message
01/26/21	9:10 AM	Matt Caldwell		text message
01/26/21	9:10 AM	Melissa Giovanelli		text message
01/26/21	9:10 AM	Chris Patricca		text message

TRG REPORT



www.lee.vote

Qualifying Department Call Log

[illegible]

12:02 AM
(Eastern)

11-17-2020

9:27 PM
(Eastern)

LogIn Success

11-17-2020

9:28 PM
(Eastern)

LogIn Success

02-01-2021

8:43 PM
(Eastern)

LogIn Success

02-01-2021

10:22 PM
(Eastern)

RptFile op(Create Final Report For Review), calculate(), elecfile(Y), Stopit()

02-01-2021

10:22 PM
(Eastern)

Stat(upd) 10/30/2020-02/01/2021

02-01-2021

10:22 PM
(Eastern)

RPTCreate 10/30/2020-02/01/2021 - #1243130

02-01-2021

10:25 PM
(Eastern)

PINassn #1243130 Report PINed("CAND" "TRES")

02-01-2021

10:25 PM
(Eastern)

PDFGen Report (#1243130) begin generation

02-01-2021

10:25 PM
(Eastern)

RptSub Report (#1243130) submitted

02-08-2021

9:38 PM
(Eastern)

LogIn Success

02-08-2021

10:00 PM
(Eastern)

RptFile op(Create Final Report For Review), calculate(), elecfile(Y), Stopit())

02-08-2021

10:00 PM
(Eastern)

Stat(upd) 10/30/2020-02/01/2021

02-08-2021

10:00 PM
(Eastern)

RPTCreate 10/30/2020-02/01/2021 - #1243488

02-08-2021

10:03 PM
(Eastern)

PINassn #1243488 Report PINed("CAND" "TRES")

02-08-2021

10:03 PM
(Eastern)

PDFGen Report (#1243488) begin generation

02-08-2021

10:03 PM
(Eastern)

RptSub Report (#1243488) submitted

02-09-2021

4:32 PM
(Eastern)

LogIn Success

02-09-2021

4:33 PM
(Eastern)

DelCont Contribution Deleted

02-09-2021

4:33 PM
(Eastern)

DelCont Contribution Deleted

Administrator Log (last 2 years)...

Click for Helpful Hint!

cheryl	2019-02-11 13:14:41	Logged In	
cheryl	2019-02-11 13:15:48	UdtCand	Candidate Updated:BENNETT
tammy	2019-02-11 14:56:52	Logged In	
cheryl	2019-02-11 15:12:36	Rejected	DHC: 10500 # candidate:
cheryl	2019-02-12 10:24:37	Logged In	
tammy	2019-02-12 10:25:33	Logged In	
cheryl	2019-02-12 10:34:53	Rejected	DHC: 10500 # candidate:
cheryl	2019-02-12 10:38:21	Rejected	DHC: 10500 # candidate:
cheryl	2019-02-12 15:54:33	Logged In	
cheryl	2019-02-13 08:24:20	Logged In	
tammy	2019-02-13 09:41:24	Logged In	
tammy	2019-02-13 09:41:32	Logged In	
cheryl	2019-02-13 12:07:48	Logged In	
cheryl	2019-02-13	Logged	

02-09-2021 4:33 PM (Eastern)	DelCont	Contribution Deleted
02-09-2021 4:33 PM (Eastern)	DelCont	Contribution Deleted
02-09-2021 4:33 PM (Eastern)	DelCont	Contribution Deleted
02-09-2021 4:35 PM (Eastern)	RptFile	op(Create Final Report For Review), calculate(), elecfile(Y), Stopit()
02-09-2021 4:35 PM (Eastern)	Stat(upd)	10/30/2020-02/01/2021
02-09-2021 4:35 PM (Eastern)	RPTCreate	10/30/2020-02/01/2021 - #1243537
02-09-2021 4:38 PM (Eastern)	PINassn	#1243537 Report PINed("CAND" "TRES")
02-09-2021 4:38 PM (Eastern)	PDFGen	Report (#1243537) begin generation
02-09-2021 4:38 PM (Eastern)	RptSub	Report (#1243537) submitted
02-09-2021 7:44 PM (Eastern)	LogIn	Success
02-09-2021 9:19 PM (Eastern)	LogIn	Success
02-09-2021 10:07 PM (Eastern)	LogIn	Success
02-10-2021 3:37 PM (Eastern)	LogIn	Success
02-10-2021 8:43 PM (Eastern)	LogIn	Success
02-10-2021 8:49 PM (Eastern)	DelCont	Contribution Deleted
02-10-2021 8:49 PM (Eastern)	DelCont	Contribution Deleted
02-10-2021 8:57 PM (Eastern)	DelCont	Contribution Deleted
02-10-2021 9:03 PM (Eastern)	DelCont	Contribution Deleted
02-10-2021 9:04 PM (Eastern)	DelCont	Contribution Deleted
02-10-2021 9:05 PM	DelCont	Contribution Deleted

Administrator Log (last 2 years)...				
Click for Helpful Hint!				
cheryl	2019-02-11 13:14:41	Logged In		
cheryl	2019-02-11 13:15:48	UdtCand	Candidate Updated:	BENNETT
tammy	2019-02-11 14:56:52	Logged In		
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cheryl	2019-02-12 10:38:21	Rejected	DHC: 10500 #	candidate:
cheryl	2019-02-12 15:54:33	Logged In		
cheryl	2019-02-13 08:24:20	Logged In		
tammy	2019-02-13 09:41:24	Logged In		
tammy	2019-02-13 09:41:32	Logged In		
cheryl	2019-02-13 12:07:48	Logged In		
chervl	2019-02-13	Logged		

(Eastern)

02-10-2021

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02-10-2021

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Administrator Log (last 2 years)...

Click for Helpful Hint!

cheryl	2019-02-11 13:14:41	Logged In	
cheryl	2019-02-11 13:15:48	UdtCand	Candidate Updated:BENNETT
tammy	2019-02-11 14:56:52	Logged In	
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tammy	2019-02-13 09:41:32	Logged In	
cheryl	2019-02-13 12:07:48	Logged In	
cheryl	2019-02-13	Logged	

(Eastern)

02-10-2021

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02-10-2021

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02-10-2021

11:37 PM

(Eastern)

RptFile op(Create Final Report For Review), calculate(), elecfile(Y), Stopit())

02-10-2021

11:37 PM

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Stat(upd) 01/01/2020-01/31/2020

02-10-2021

11:37 PM

(Eastern)

RPTCreate 01/01/2020-01/31/2020 - #1243681

02-10-2021

11:38 PM

(Eastern)

PINassn #1243681 Report PINed("CAND" "TRES")

02-10-2021

11:38 PM

(Eastern)

PDFGen Report (#1243681) begin generation

02-10-2021

11:38 PM

(Eastern)

RptSub Report (#1243681) submitted

02-10-2021

11:41 PM

(Eastern)

DelCont Contribution Deleted

02-10-2021

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02-10-2021

11:41 PM

(Eastern)

DelCont Contribution Deleted

02-10-2021

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02-10-2021

11:53 PM

(Eastern)

RptFile op(Create Final Report For Review), calculate(), elecfile(Y), Stopit())

02-10-2021

11:53 PM

(Eastern)

Stat(upd) 10/30/2020-02/01/2021

02-10-2021

11:53 PM

(Eastern)

RPTCreate 10/30/2020-02/01/2021 - #1243682

02-10-2021

11:54 PM

(Eastern)

ClrPin Cleared PINs for #1243682

02-11-2021

12:00 AM

(Eastern)

RptFile op(Create Final Report For Review), calculate(), elecfile(Y), Stopit())

02-11-2021

12:00 AM

(Eastern)

Stat(upd) 10/30/2020-02/01/2021

02-11-2021

12:00 AM

(Eastern)

RPTCreate 10/30/2020-02/01/2021 - #1243683

Administrator Log (last 2 years)...

Click for Helpful Hint!

cheryl	2019-02-11 13:14:41	Logged In	
cheryl	2019-02-11 13:15:48	UdtCand	Candidate Updated:BENNETT
tammy	2019-02-11 14:56:52	Logged In	
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tammy	2019-02-13 09:41:24	Logged In	
tammy	2019-02-13 09:41:32	Logged In	
cheryl	2019-02-13 12:07:48	Logged In	
cheryl	2019-02-13	Logged	

02-11-2021 12:00 AM (Eastern)
02-11-2021 12:00 AM (Eastern)
02-11-2021 12:00 AM (Eastern)

PINassn #1243683 Report PINed("CAND" "TRES")

PDFGen Report (#1243683) begin generation

RptSub Report (#1243683) submitted

[Return to Candidate List](#)

Administrator Log (last 2 years)...

Click for Helpful Hint!

cheryl	2019-02-11 13:14:41	Logged In	
cheryl	2019-02-11 13:15:48	UdtCand	Candidate Updated:BENNETT
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tammy	2019-02-13 09:41:32	Logged In	
cheryl	2019-02-13 12:07:48	Logged In	
cheryl	2019-02-13	Logged	




LEE COUNTY ELECTIONS

CANDIDATE CAMPAIGN FILE COVER SHEET

☒ ORIGINAL

☐ REVISED

Candidate Name	Jacqueline Perez		
Residence Address	17675 Boat Club Dr.		
City and Zip Code	Fort Myers FL 33908		
Mailing Address	<input checked="" type="checkbox"/> Check if same as above. <input type="checkbox"/> Check if different from residence.		
Telephone Number(s)	<input checked="" type="checkbox"/> Daytime (list below) 239-878-2200	OR	<input type="checkbox"/> Alternate (list below)
Campaign Email Address	Intmarco9@yahoo.com		
Campaign Website			
Office Sought	Lee County School Board District 3		
Area, District, Group or Seat #	District 3		
<p>→ Judicial, School Board, Supervisor of Elections, and Special District Offices such as Community Development, Fire, Health System, Library and Mosquito Control are non-partisan offices. A candidate for any of these offices, must indicate "non-partisan" on the line below.</p> <p>→ A candidate for a Constitutional Office or County Commission may file partisan or "No Party Affiliation" (NPA) and shall indicate a political party affiliation or "No Party Affiliation" on the line below.</p>			
→ Political Party for Office Sought	NON		
Incumbent	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
Date of Birth or Voter Registration ID #	09/19/1966		
Candidate Signature & Date	 01/06/2020		

The Lee County Supervisor of Elections posts all candidate qualifying documents and campaign finance reports on its website www.lee.vote or visit the following link: <http://www.lee.vote/campaigns/candidate-packets/> and <http://www.lee.vote/campaigns/candidate-finance-reports/>. Under Florida Law, a candidate's campaign-contact information, such as address, telephone number, and email address are available to the public. Do not hesitate to contact this office at (239) LEE-VOTE (239-533-8683) for more information about becoming a candidate for public office.

**APPOINTMENT OF CAMPAIGN TREASURER
AND DESIGNATION OF CAMPAIGN
DEPOSITORY FOR CANDIDATES**

(Section 106.021(1), F.S.)

(PLEASE PRINT OR TYPE)

20JAN06PM0436 SDE Lee Co FL

NOTE: This form must be on file with the qualifying officer before opening the campaign account.

OFFICE USE ONLY

1. CHECK APPROPRIATE BOX(ES):

☒ Initial Filing of Form Re-filing to Change: ☐ Treasurer/Deputy ☐ Depository ☐ Office ☐ Party

2. Name of Candidate (in this order: First, Middle, Last)

Jacqueline Perez

3. Address (include post office box or street, city, state, zip code)

17675 Boat Club Dr
Fort Myers Florida 33908

4. Telephone

(239) 878-2200

5. E-mail address

intmarco9@yahoo.com

6. Office sought (include district, circuit, group number)

School Board District 3 Lee County.

7. If a candidate for a nonpartisan office, check if applicable:

☐ My intent is to run as a Write-In candidate.

8. If a candidate for a partisan office, check block and fill in name of party as applicable: My intent is to run as a

☐ Write-In ☐ No Party Affiliation ☐ _____ Party candidate.

9. I have appointed the following person to act as my ☒ Campaign Treasurer ☐ Deputy Treasurer

10. Name of Treasurer or Deputy Treasurer

Jacqueline Perez

11. Mailing Address

17675 Boat Club Dr

12. Telephone

(239) 878-2200

13. City

Fort Myers

14. County

Lee

15. State

FL

16. Zip Code

33908

17. E-mail address

intmarco9@yahoo.com

18. I have designated the following bank as my ☒ Primary Depository ☐ Secondary Depository

19. Name of Bank

Regions Bank

20. Address

11881 Palm Beach Blvd.

21. City

Fort Myers

22. County

Lee

23. State

FL.

24. Zip Code

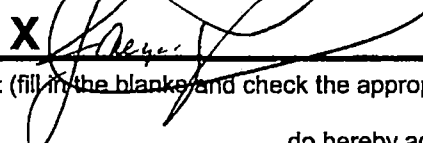
33905

UNDER PENALTIES OF PERJURY, I DECLARE THAT I HAVE READ THE FOREGOING FORM FOR APPOINTMENT OF CAMPAIGN TREASURER AND DESIGNATION OF CAMPAIGN DEPOSITORY AND THAT THE FACTS STATED IN IT ARE TRUE.

25. Date

01/06/2020

26. Signature of Candidate

☒ 

27. Treasurer's Acceptance of Appointment (fill in the blanks and check the appropriate block)

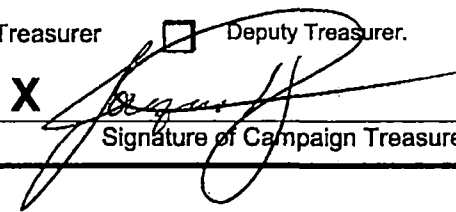
I, Jacqueline Perez (Please Print or Type Name), do hereby accept the appointment

designated above as: ☒ Campaign Treasurer ☐ Deputy Treasurer.

01/06/2020

Date

☒


Signature of Campaign Treasurer or Deputy Treasurer

STATEMENT OF CANDIDATE

(Section 106.023, F.S.)

(Please print or type)

OFFICE USE ONLY

20JAN08PM0436 50E Lee Co F1

I, Jacqueline Perez,

candidate for the office of Lee County School Board District 3;

have been provided access to read and understand the requirements of
Chapter 106, Florida Statutes.

X Jacqueline Perez
Signature of Candidate

01/6/2020
Date

Each candidate must file a statement with the qualifying officer within 10 days after the Appointment of Campaign Treasurer and Designation of Campaign Depository is filed. Willful failure to file this form is a first degree misdemeanor and a civil violation of the Campaign Financing Act which may result in a fine of up to \$1,000, (ss. 106.19(1)(c), 106.265(1), Florida Statutes).

CANDIDATE OATH -
SCHOOL BOARD
NONPARTISAN OFFICE

Check box *only* if you are seeking to qualify as a write-in candidate:

☐ Write-in candidate

20JUN11PM0447 91EL ee Cc F1

OFFICE USE ONLY

Candidate Oath

(Sections 99.021(1)(a) and 105.031, Florida Statutes)

I, Jacqueline Perez
(Print name above as you wish it to appear on the ballot. If your last name consists of two or more names but has no hyphen, check box ☐. (See page 2 - Compound Last Names). No change can be made after the end of qualifying. Although a write-in candidate's name is not printed on the ballot, the name must be printed above for oath purposes.)

am a candidate for the nonpartisan office of Lee County School Board 3
(Office) (District #)

; I am a qualified elector of Lee County, Florida;
(Circuit #) (Group or Seat #)

I am qualified under the Constitution and the Laws of Florida to hold the office to which I desire to be nominated or elected; I have qualified for no other public office in the state, the term of which office or any part thereof runs concurrent with the office I seek; and I have resigned from any office from which I am required to resign pursuant to Section 99.012, Florida Statutes; and I will support the Constitution of the United States and the Constitution of the State of Florida.

Section 876.05, Florida Statutes, oath (only applicable if elected and when term of office begins): I, a citizen of the State of Florida and of the United States of America, and being employed by or an officer of the school board and a recipient of public funds as such employee or officer, do hereby solemnly swear or affirm that I will support the Constitution of the United States and of the State of Florida.

Candidate's Florida Voter Registration Number (located on your voter information card)

Phonetic spelling for audio ballot: Print name phonetically on the line below as you wish it to be pronounced on the audio ballot as may be used by persons with disabilities (see instructions on page 2 of this form): [Not applicable to write-in candidates.]

X

Signature of Candidate

Telephone Number

Email Address

Address

City

State

ZIP Code

STATE OF FLORIDA

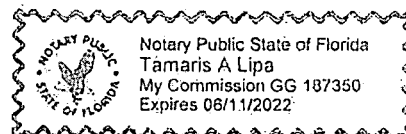
COUNTY OF LEE

Signature of Notary Public

Print, Type, or Stamp Commissioned Name of Notary Public below:

Sworn to (or affirmed) and subscribed before me by physical ☒ or
online ☐ presence this 11 day of JUNE, 2020
Personally Known: ☐ or Produced Identification: ☒

Type of Identification Produced: FLDL



FORM 6

FULL AND PUBLIC DISCLOSURE

2019

Please print or type your name, mailing address, agency name, and position below:

OF FINANCIAL INTERESTS

FOR OFFICE USE ONLY:

LAST NAME — FIRST NAME — MIDDLE NAME:

Perez, Jacqueline

MAILING ADDRESS:

17675 Boat Club Dr.

CITY:

Fort Myers

ZIP:

FL 33908

COUNTY:

Lee

NAME OF AGENCY:

Lee County School District

NAME OF OFFICE OR POSITION HELD OR SOUGHT:

Lee County School Board District 3

CHECK IF THIS IS A FILING BY A CANDIDATE ☐

PART A — NET WORTH

Please enter the value of your net worth as of December 31, 2019 or a more current date. [Note: Net worth is not calculated by subtracting your reported liabilities from your reported assets, so please see the instructions on page 3.]

My net worth as of June 11, 2020 was \$ 726,958.91.

PART B — ASSETS

HOUSEHOLD GOODS AND PERSONAL EFFECTS:

Household goods and personal effects may be reported in a lump sum if their aggregate value exceeds \$1,000. This category includes any of the following, if not held for investment purposes: jewelry; collections of stamps, guns, and numismatic items; art objects; household equipment and furnishings; clothing; other household items; and vehicles for personal use, whether owned or leased.

The aggregate value of my household goods and personal effects (described above) is \$ 70,000 —

ASSETS INDIVIDUALLY VALUED AT OVER \$1,000:

DESCRIPTION OF ASSET (specific description is required - see instructions p.4)

VALUE OF ASSET

17675 Boat Club Dr. Fort Myers FL 33908

600,000 —

16175 OLD US 41, Fort Myers FL 33912

335,000 —

PLATINUM Relationship Money Market Regions Bank.

48,705 —

Regions Checking Acct.

4700 —

PART C — LIABILITIES

LIABILITIES IN EXCESS OF \$1,000 (See instructions on page 4):

NAME AND ADDRESS OF CREDITOR

AMOUNT OF LIABILITY

Suntrust loan P.O. Box 7904 Baltimore MD, 21277-6041

\$324,302.09

PNC Bank loan 405 S. Ave S. Naples FL 34102

\$7144 —

JOINT AND SEVERAL LIABILITIES NOT REPORTED ABOVE:

NAME AND ADDRESS OF CREDITOR

AMOUNT OF LIABILITY

N/A.

PART D -- INCOME

Identify each separate source and amount of income which exceeded \$1,000 during the year, including secondary sources of income. Or attach a complete copy of your 2019 federal income tax return, including all W2s, schedules, and attachments. Please redact any social security or account numbers before attaching your returns, as the law requires these documents be posted to the Commission's website.

- ☐ I elect to file a copy of my 2019 federal income tax return and all W2's, schedules, and attachments.
 (If you check this box and attach a copy of your 2019 tax return, you need not complete the remainder of Part D.)

PRIMARY SOURCES OF INCOME (See instructions on page 5):

NAME OF SOURCE OF INCOME EXCEEDING \$1,000	ADDRESS OF SOURCE OF INCOME	AMOUNT
International Marble Co.	16175 OLD US 41 Ft. Myers FL 33912	95,000 -

SECONDARY SOURCES OF INCOME (Major customers, clients, etc., of businesses owned by reporting person--see instructions on page 5):

NAME OF BUSINESS ENTITY	NAME OF MAJOR SOURCES OF BUSINESS' INCOME	ADDRESS OF SOURCE	PRINCIPAL BUSINESS ACTIVITY OF SOURCE
N/A			

PART E -- INTERESTS IN SPECIFIED BUSINESSES [Instructions on page 6]

	BUSINESS ENTITY # 1	BUSINESS ENTITY # 2	BUSINESS ENTITY # 3
NAME OF BUSINESS ENTITY	N/A		
ADDRESS OF BUSINESS ENTITY			
PRINCIPAL BUSINESS ACTIVITY			
POSITION HELD WITH ENTITY			
I OWN MORE THAN A 5% INTEREST IN THE BUSINESS			
NATURE OF MY OWNERSHIP INTEREST			

PART F - TRAINING

For officers required to complete annual ethics training pursuant to section 112.3142, F.S.

- ☐ I CERTIFY THAT I HAVE COMPLETED THE REQUIRED TRAINING.

OATH

I, the person whose name appears at the beginning of this form, do depose on oath or affirmation and say that the information disclosed on this form and any attachments hereto is true, accurate, and complete.

[Signature]
 SIGNATURE OF REPORTING OFFICIAL OR CANDIDATE

STATE OF FLORIDA

COUNTY OF LEE

Sworn to (or affirmed) and subscribed before me by means of

☒ physical presence or ☐ online notarization, this 11 day of

JUNE, 2020 by JACQUELINE PEREZ

[Signature]
 (Signature of Notary Public--State of Florida)

(Print, Type, or Stamp Commissioned Name of Notary Public)
 Notary Public State of Florida
 Tamaris A Lipa
 My Commission GG 107350
 Expires 06/12/22

Personally Known _____

Type of Identification Produced FL DL

If a certified public accountant licensed under Chapter 473, or attorney in good standing with the Florida Bar prepared this form for you, he or she must complete the following statement:

I, _____, prepared the CE Form 6 in accordance with Art. II, Sec. 8, Florida Constitution, Section 112.3144, Florida Statutes, and the instructions to the form. Upon my reasonable knowledge and belief, the disclosure herein is true and correct.

Signature _____

Date _____

Preparation of this form by a CPA or attorney does not relieve the filer of the responsibility to sign the form under oath.

IF ANY OF PARTS A THROUGH E ARE CONTINUED ON A SEPARATE SHEET, PLEASE CHECK HERE ☐



LEE COUNTY ELECTIONS

Tommy Doyle
Supervisor of Elections
(239) LEE-VOTE (533-8683) • www.lee.vote
05-18-2020

Canvassing Board Meeting Dates – August 18, 2020, Primary Election

Initial Canvass of Vote-by-Mail Ballots:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Monday, 07-27-20 at 9 AM

Logic and Accuracy Testing of the Tabulating Equipment or Voting Machines used at Early Voting and Election Day Precincts, and the Tabulating Equipment used for Vote-by-Mail Ballots:

Lee County Elections Center, 13180 S. Cleveland Ave., Fort Myers, 33907
• Wednesday, 07-29-20 at 9 AM – *Immediately Following Proceed to the Main Office (see below)*

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Wednesday, 07-29-20

Review of Vote-by-Mail Ballots:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• 9 AM Each Meeting (see below)
• Friday, 07-31-20 • Monday, 08-03-20 • Wednesday, 08-05-20 • Friday, 08-07-20
• Monday, 08-10-20 • Wednesday, 08-12-20 • Friday, 08-14-20 • Monday, 08-17-20

Election Day

Review of Vote-by-Mail Ballots and Receive Preliminary Election Night Results:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Tuesday, 08-18-20
• NOON, 4 PM, and 6 PM until finished

Canvass of Provisional Ballots, Review of Vote-by-Mail Ballots, Submit 1st Unofficial Results, Submit Official Results, Certify the Election, Submit Conduct of Election Report, Random Selection of Race and Precinct(s) for the Post-Election Manual Audit:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Friday, 08-21-20 at 8 AM

Post-Election Manual Audit:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Wednesday, 08-26-20 at 9 AM

In the event of a machine or manual recount, the additional dates of 08-22-20 through 08-25-20 will apply.

Canvassing Board Meeting Dates – November 3, 2020, General Election

Logic and Accuracy Testing of the Tabulating Equipment or Voting Machines used at Early Voting and Election Day Precincts, the Tabulating Equipment used for Vote-by-Mail Ballots, and the Initial Canvass of Vote-by-Mail Ballots:

Lee County Elections Center, 13180 S. Cleveland Ave., Fort Myers, 33907
• Monday, 10-12-20 at 9 AM – *Immediately Following Proceed to the Main Office (see below)*

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Monday, 10-12-20

Review of Vote-by-Mail Ballots:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• 9 AM Each Meeting (see below)
• Wednesday, 10-14-20 • Friday, 10-16-20 • Monday, 10-19-20
• Wednesday, 10-21-20 • Friday, 10-23-20 • Monday, 10-26-20
• Wednesday, 10-28-20 • Friday, 10-30-20 • Monday, 11-02-20

Election Day

Review of Vote-by-Mail Ballots and Receive Preliminary Election Night Results:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Tuesday, 11-03-20
• 9 AM, NOON, 3 PM, and 5 PM until finished

Canvass of Provisional Ballots, Review of Vote-by-Mail Ballots, Submit 1st Unofficial Results:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Friday, 11-06-20 at 2 PM

Canvass of Overseas Vote-by-Mail Ballots, Submit Official Results, Certify the Election, Submit Conduct of Election Report, Random Selection of Race and Precinct(s) for the Post-Election Manual Audit:

Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Friday, 11-13-20 at NOON

Post-Election Manual Audit:

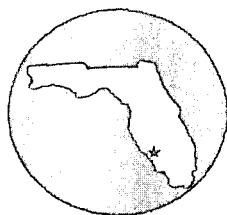
Lee County Elections Main Office, Melvin Morgan Constitutional Complex, 2480 Thompson St., 3rd Floor, Fort Myers, 33901
• Wednesday, 11-18-20 at 9 AM

In the event of a machine or manual recount, the additional dates of 11-08-20 through 11-14-20 will apply.

I am a candidate for local office and have received a copy of the above schedules.

<input checked="" type="checkbox"/>	<i>Angela B...</i>	<i>Jocavino Perez</i>	<i>10/11/2020</i>
Signature		Print Name	Date

20201111PM044736 Lee Co FL



LEE COUNTY ELECTIONS

Candidate and Committee Campaign Financial Reporting System Affidavit All late filings are subject to automatic fines!

The Lee County Supervisor of Elections provides its own Campaign Financial Reporting System for the filing of campaign finance reports required in accordance with Sections 106.07(5), 106.0703(4), 106.071(1), FS 106.29(2) Florida Statutes. The Campaign Financial System (CFR System) facilitates the *electronic filing* of required campaign finance reports in lieu of filing original and signed campaign finance reports by hand delivery or standard mail.

Please Indicate your position:

(If you hold more than one position, mark appropriate boxes.)

1. ☒ Candidate for Public Office

(if candidate is also treasurer or a deputy treasurer, mark appropriate box for #5 or #6)

2. ☐ Chairman—Executive Political Party

3. ☐ Chairman—PC-Political Committee

4. ☐ Principal Officer—ECO-Electioneering Organization

(if also serving as treasurer or a deputy treasurer, mark appropriate box for #5 or #6)

5. ☒ Campaign Treasurer

6. ☐ Deputy Campaign Treasurer

7. ☐ Individual or person filing an Independent Expenditure or Electioneering Communication Report (not same as #1 through #6)

State of Florida

County of Lee

In using the Campaign Financial Reporting System provided by the Lee County Supervisor of Elections, my signature on this affidavit serves as certification of any campaign treasurer's report filed by me or on my behalf as a candidate for public office; as a campaign treasurer or deputy campaign treasurer; as a chairman for an executive political party committee or political committee, as a principal officer of an electioneering communication organization; as an individual or person filing an independent expenditure report; or as an individual or person filing an electioneering communication report. I understand that all late filings are subject to automatic fines in accordance with Section 106.07, Florida Statutes.

I certify that I will examine each report for correctness and further certify to the accuracy and veracity of each report filed after such examination.

<input checked="" type="checkbox"/> Signature	Print Name	Date
<i>[Signature]</i>	Jacqueline Perez	01/06/2020



LEE COUNTY ELECTIONS

Tommy Doyle, Supervisor of Elections

(239) LEE-VOTE (533-8683)

www.lee.vote

TEXT MESSAGING SERVICE AGREEMENT

Would you like to receive text message reminders from Lee County Supervisor of Elections (Lee County SOE) about your Campaign Financial Reports and notifications? The Lee County SOE is offering a reminder service by text message to your cell phone. This service is optional. You will continue to receive notices by mail and/or email regardless of whether you choose to receive text messages.

We will not send you text messages without your consent. Text messages are not confidential – anyone who uses your cell phone or who has access to it might see the text messages. Communication service providers used by you or Lee County SOE may also be able to see these messages. Text message charges may apply depending on your text message plan. Therefore, the Lee County SOE will not send you text messages without your permission.

By signing this Text Messaging Service Agreement, you are authorizing the Lee County SOE to send you text messages regarding reports due, important dates and other information pertaining to your account.

You may stop this service by texting STOP to any message or by calling the Qualifying Department.

I understand that this service is optional and I can STOP it at any time.

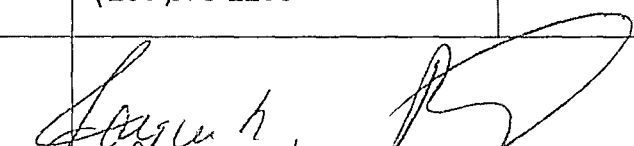
I would like to receive text messages from Lee County SOE.



YES



NO

Printed Name	Jacqueline Perez	Date	01/06/2020
Office Sought	School Board District 3		
Cell Phone Number	(239) 878-2200	User ID #	OFFICE USE
Signature			

20190610437 SOE Lee Co Fl

***Voter* Focus**

Campaign Financial Reporting System

How to File Financial Reports Online

A HANDBOOK FOR CANDIDATES AND COMMITTEES

02/12/2020

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What's shown in an online financial report?

Florida law requires that county candidates, political committees and political parties file campaign finance reports with the Supervisor of Elections following the current election cycle reporting calendar. Campaign finance reports detail all contributions received and expenditures made by or on behalf of the candidate, committee or party. The **Voter Focus Campaign Financial Reporting** system gives campaign treasurers an easy way to complete and file the required reports, online.

The Lee County Supervisor of Elections accepts electronically filed campaign finance reports. The report can be submitted online, signed by the candidate's and treasurer's electronic personal identification numbers (PINs). Each report generated by the Campaign Financial Reporting system is also available as a PDF document that can be viewed in Adobe® Acrobat® Reader. The PDF document can be printed for your files.

Once a report is accepted by the Supervisor of Elections, it will appear on the elections office website and can be viewed by the public. A candidate, committee or party also has the option of providing a short description (or "bio") and a photograph.

Here's an example of a monthly report:

CAMPAIGN TREASURER'S REPORT SUMMARY

(1) Name: Carolyn J. Casadente
(2) Address (number and street): 1645 Harrison CT, Palmetto, FL 32217
City, State, Zip Code
☐ Check here if address has changed
(3) ID Number: 312

OFFICE USE ONLY
ONLINE SUBMISSION
[S088118]
Submitted on: 6/4/2015 16:25:24 (Eastern)

(4) Check appropriate box(es):
☒ Candidate Office Sought: County Commission, District 3
☐ Political Committee (PC)
☐ Electioneering Communications Org. (ECO)
☐ Party Executive Committee (PTY)
☐ Independent Expenditure (IE) (also covers an individual making electioneering communications)
☐ Check here if PC or ECO has disbanded
☐ Check here if PTY has disbanded
☐ Check here if no other IE or EC reports will be filed

(5) Report Identifiers
Cover Period: From 6/1/2015 To 6/30/2015 Report Type: 6
☒ Original ☐ Amendment ☐ Special Election Report

(6) Contributions This Report
Cash & Checks \$ - 150.00
Loans \$ - 0.00
Total Monetary \$ - 150.00
In-Kind \$ - 300.00

(7) Expenditures This Report
Monetary Expenditures \$ - 1,000.00
Transfers to Office Account \$ - 0.00
Total Monetary \$ - 1,000.00

(8) Other Distributions \$ - 0.00

(9) TOTAL Monetary Contributions To Date \$ - 250.00

(10) TOTAL Monetary Expenditures To Date \$ - 1,000.00

(11) Certification
It is a first degree misdemeanor for any person to falsify a public record (ss. 839.13, F.S.)
I certify that I have examined this report and it is true, correct, and complete.
(Type name) ☒ Individual (only for IE or electioneering system) ☐ Treasurer ☐ Deputy Treasurer
Signature: X
(Type name) ☐ Candidate ☐ Chairperson (only for PC and PTY)
Signature: X

DS-DE 12 (Rev. 1/13) SEE REVERSE FOR INSTRUCTIONS

First, there's a summary page

Then, an itemized list of contributions

CAMPAIGN TREASURER'S REPORT - ITEMIZED CONTRIBUTIONS

(1) Name: Carolyn J. Casadente (2) I.D. Number: 312
(3) Cover Period: 6/1/2015 through 6/30/2015 (4) Page: 1 of 1

(6) Date	(7) Full Name (Last, First, Middle) (8) Signature Number	(9) Street Address & City, State, Zip Code	(10) Contributor Type - Occupation	(11) Contribution Type	(12) In-kind Description	(13) Amount
6/1/2015	Barbary, Anne 141 Redwood Road Palmetto, FL 32212		CA			150.00
6/1/2015	Silva, Marlene 101 Redwood Road Palmetto, FL 32212		CA			150.00
6/1/2015	Rogers, Bill 101 Redwood Road Palmetto, FL 32212		CA			150.00

DS-DE 13 (Rev. 1/14) SEE REVERSE FOR INSTRUCTIONS AND CODE VALUES

[illegible]

CAMPAIGN TREASURER'S REPORT - ITEMIZED DISTRIBUTIONS						
(1) Name <u>Carolyn J. Casadonte</u>		(2) I.D. Number <u>312</u>				
(3) Cover Period <u>6/1/2015</u> through <u>6/30/2015</u>		(4) Page <u>1</u> of <u>1</u>				
(5) Date	(7) Full Name (Last, Suffix, First, Middle) Street Address & City, State, Zip Code	(8) Purpose (add office sought if contribution to a candidate)	(9) Related Expenditures	(10) Amendment	(11) Amount	
6/4/2015	Eric Wu Campaign Account	mailouts	2015-2015-6-2		1560.00	
1	222 South Street Tallahassee, FL 32302					



CAMPAIGN TREASURER'S REPORT – FUND TRANSFERS

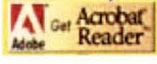
(1) Name Carolyn J. Casadonte (2) I.D. Number 312

(3) Cover Period 6/1/2015 through 6/30/2015 (4) Page 1 of 1

(5) Date	(7) Name of Financial Institution Street Address & City, State, Zip Code	(8) Transfer Type	(9) Nature of Account	(10) Amendment	(11) Amount
(5) Sequence Number					
6/6/2015	SunBank, 887 Thomasville Rd Tallahassee, FL	TO	money market	Add	\$1,500.00
1					

What do I need to create reports online?

- **A computer equipped with:**

1. An Internet connection.
2. A web browser configured to accept cookies and with pop-up blockers disabled. In this document, the examples shown use Internet Explorer.
3. Adobe® Acrobat® Reader,  which you will need to view and print your reports. If you don't have the Reader software on your computer, you can download it free of charge from:
 - a link in the Campaign Financial Reporting System. (see page 21)or
 - www.adobe.com
4. A printer, if you want to print a hard copy of the report for your records.

- **A candidate ID and password.**

This will be provided to you by the elections office.

Candidates need a new ID each time they run for office, even when they are running for reelection to the same office. Committees will also need an ID.

Committees in continuous existence typically are allowed to keep the same ID. A Lee County committee will keep the same ID unless the committee disbands and later re-organizes.

You will be required to change the initial password issued by the System Administrator.

A new password will be issued anytime a change in officers has occurred.

- **PINs for the candidate and campaign treasurer password.**

Lee County permits electronic submission of campaign reports. The Elections Office will issue you two 4-digit PINs. You can change the PINs after logging in, if you wish. Anytime a treasurer has been added or changed new PINs will be issued.

(see page 58-59)

How do I start?

Log into the Campaign Financial Reporting system like this:

- 1 Type this web address into your browser or access the link when provided by the office:
You can enter lowercase or uppercase letters; the letter case doesn't matter here. Note the "underscore" in the web address.

`https://www.voterfocus.com/ws/WScand/candidate_pb.php?county=lee`

- 2 Press the **Enter** key on your keyboard or click the "go" icon in your web browser (You will want to save this page to your Favorites). You'll then see the Candidate Log In page:

Candidate Log In

Important Notice Campaign finance reports must be completed and submitted (filed) through the electronic filing system not later than midnight of the day required by law therefore, and that late-filed campaign finance reports are subject to the penalties prescribed under Section 106.07(8), Florida Statutes.

Numeric Candidate ID (no leading zeros) Password Login

[Forgot Password?](#)

- 3 Enter your candidate ID and password here.

The password is case-sensitive. That means you have to enter the password exactly as it was given to you by the elections office: if a letter is uppercase, you must enter it in uppercase; the same goes for lowercase letters. Your password might also have numbers.

- 4 Click **Login**.

You will be required to change your password the first time you log in. After you click **Login**, you will see the Candidate Reset Password page.

Candidate Reset Password

The administrator has required that you reset your password upon first login.

Enter a new password in the **New Password** field.

Enter the same password in the **Re-enter Password** field to confirm the new password.

New Password

Re-enter Password

Reset Password

Enter a new password in the fields and then click **Reset Password**. On the Candidate Log In page, re-enter your candidate ID and your new password and click Login again. You will need to document these passwords as the Elections Office does not have access to them.

What you see when you log in.

This is the main page of the Campaign Financial Reporting System. It shows the reporting periods for the campaign. We call this page the *Report List*.

Your name **Your candidate ID**

Candidate/Committee : Carolyn J. Casadonte (312)

Office : County Commission, District 3

Log Out Edit Candidate/Committee Bio Information/Upload Photo Change Password/PINs

Export All Transactions CSV

Election **Help** **Office sought or issue**

Press Help for information on using the new 'Import Entries' feature.

Candidate Reports				
Election : County 2015 (2015-11-04)				
Past Reporting Periods Current Reporting Periods Future Reporting Periods				
Rpt Date	Total Contrib	Total Exp	Status	
2015-5 (05/01/2015 - 05/31/2014) 6/3/2015	-	-	No Data Entered This report is now overdue 1 day. Unlock this report	Import Entries Enter Contribution Enter Transfers Enter Expenditure Enter Distributions Prepare Totals Create Waiver Report
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	-	-	No Data Entered	Import Entries Enter Contribution Enter Transfers Enter Expenditure Enter Distributions Prepare Totals Create Waiver Report
2015-7 (07/01/2015 - 07/31/2015) 8/10/2015	\$50.00 (1 item)	-	Submitted #1073251 Unlock this report	View Contributions View Transfers View Expenditures View Distributions Print Amend Export CSV

Time periods when financial reports are required. Colors indicate reporting periods:

- Past Reporting Periods (beige)
- Current Reporting Periods (green)
- Future Reporting Periods (blue)

The reporting periods are color-coded to help you choose the correct period for reporting data.

The past and future reporting periods are locked to prevent you from inadvertently entering current data into a past or future report. If you need to enter past or future data, you can easily unlock the report by clicking [Unlock this report](#).

The colors of the reporting periods switch automatically at midnight on the due date of the current report.

If any of your reports are overdue or the due date is less than 10 days away (that is, 9 or fewer days), you'll see a message like this at the top of the page:

For Example:

The screenshot shows a web interface for a candidate or committee. At the top, a yellow banner with a red border displays the text: "Warning! Your 2015-5 report is now overdue 1 day." Below this, the user's name "Candidate/Committee : Carolyn J. Casadonte (312)" is shown. Navigation buttons include "Log Out", "Edit Candidate/Committee Bio Information/Upload Photo", "Change Password/PINs", "Export All Transactions CSV", and "Help". A message below the buttons says: "Press Help for information on using the new 'Import Entries' feature." The main section is titled "Candidate Reports" and shows "Election : County 2015 (2015-11-04)". It features three tabs: "Past Reporting Periods" (highlighted in green), "Current Reporting Periods" (highlighted in blue), and "Future Reporting Periods". A table lists reporting periods with columns for "Rpt Date", "Total Contrib", "Total Exp", and "Status". The row for "2015-5 (05/01/2015 - 05/31/2014) 6/3/2015" is highlighted in yellow. The "Status" column for this row contains a red box with the text: "No Data Entered This report is now overdue 1 day." and a button "Unlock this report". To the right of the table is a sidebar with buttons: "Import Entries", "Enter Contribution", "Enter Transfers", "Enter Expenditure", "Enter Distributions", "Prepare Totals", and "Create Waiver Report". A red arrow points from the "For Example:" text to the warning banner, and another red arrow points from the "And the due/overdue report(s) will be highlighted as well." text to the yellow-highlighted row in the table.

Rpt Date	Total Contrib	Total Exp	Status
2015-5 (05/01/2015 - 05/31/2014) 6/3/2015			No Data Entered This report is now overdue 1 day. Unlock this report

And the due/overdue report(s) will be highlighted as well. After 180 days, overdue reports are no longer highlighted as late.

IMPORTANT

If a report is overdue, you need to take immediate action to file the report. Fines on late reports can be significant. Reports that are due immediately before an election can have severe fine penalties.

Let's look at the current reporting period.

Name of reporting period Contributions so far Expenditures so far Command buttons for entering data.

We'll look at these more closely on the next page.

Candidate Reports				
Election : County 2015 (2015-11-04)				
Past Reporting Periods		Current Reporting Periods	Future Reporting Periods	
Rpt Date	Total Contrib	Total Exp	Status	
2015-5 (05/01/2015 - 05/31/2015) 6/3/2015	\$50.00 (1 item)	-	Submitted #1088116 Unlock this report	<input type="button" value="View Contributions"/> <input type="button" value="View Transfers"/> <input type="button" value="View Expenditures"/> <input type="button" value="View Distributions"/> <input type="button" value="Print"/> <input type="button" value="Amend"/>
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	-	Not Filed Data Entry Started	<input type="button" value="Import Entries"/> <input type="button" value="Enter Contribution"/> <input type="button" value="Enter Transfers"/> <input type="button" value="Enter Expenditure"/> <input type="button" value="Enter Distributions"/> <input type="button" value="Prepare Totals"/> <input type="button" value="Create Final Report For Review"/> <input type="button" value="Export CSV"/>
2015-7 (07/01/2015 - 07/31/2015) 8/10/2015	\$50.00 (1 item)	-	Submitted #1073251 Unlock this report	<input type="button" value="View Contributions"/> <input type="button" value="View Transfers"/> <input type="button" value="View Expenditures"/> <input type="button" value="View Distributions"/> <input type="button" value="Print"/> <input type="button" value="Amend"/> <input type="button" value="Export CSV"/>

Start and end dates also called the reporting period Date when report is due Status of the report.

In this example, the candidate has started entering contributions for the current reporting period but has not submitted the report to the elections office.

About those command buttons...

Import Entries

If you use campaign finance reporting software like Campaign ToolBox™, you can import contributions and expenditures directly from that application.

Pages 29-30 explains how.

Enter Contributions

Enter Expenditures

To manually enter contributions and expenditures, click here.

We'll talk more about manual entry on the next page.

Candidate Reports				
Election : County 2015 (2015-11-04)				
Past Reporting Periods Current Reporting Periods Future Reporting Periods				
Rpt Date	Total Contrib	Total Exp	Status	
2015-5 (05/01/2015 - 05/31/2015) 6/3/2015	\$50.00 (1 item)	-	Submitted #1068116	View Contributions View Transfers View Expenditures View Distributions Unlock this report Print Amend
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	-	Not Filed Data Entry S	Import Entries Enter Contribution Enter Transfers Enter Expenditure Enter Distributions Prepare Totals Create Final Report For Review Export CSV
2015-7 (07/01/2015 - 07/31/2015) 8/10/2015	\$50.00 (1 item)	-	Submitted #1072251	View Expenditures View Distributions Unlock this report Print Amend Export CSV

Create Final Report for Review
Submit your report to the elections office.

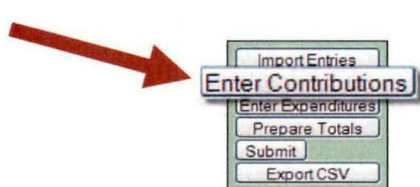
Export CSV
Create a spreadsheet of the contributions and expenditures entered in this reporting period.

Prepare Totals
View a draft copy of your report for this period prior to submitting your report to the elections office.

Enter Transfers
Enter Distributions
Click here to manually enter fund transfers and distributions.

How do I view and maintain contributions?

Click



to bring-up a list of the contributions recorded:

Campaign Treasurer's Report - Itemized Contributions									
Election : County 2015 (2015-11-04)									
Report Date : 2015-6									
(2015-06-01 - 2015-06-30)									
Add Contribution Return to Report List Amend Item from Orig Report									
	Seq Num	Date	Contributor	Contributor Type	Occupation	Contribution Type	In-Kind Description	Amend	Amount
Edit Delete	1	6/2/2015	Marsha Kirk 8899 Hillcrest Drive Palmetto, FL 32312	Individual		Cash		Delete	\$50.00
Edit Delete	2	6/2/2015	Anna Lee Barber 45 Wilson Blvd Palmetto, FL 32312	Individual		Check		Add	\$100.00
								Total In Kind	\$0.00
								Total Monetary	\$50.00
								Total	\$50.00
Add Contribution Return to Report List									

Edit lets you modify details on an existing contribution.

Delete lets you delete the contribution.

Return to Report List
Takes you back to the list of reporting periods.

The **Totals** rows show you a breakdown of *In-Kind* and *Monetary* contributions along with the combined total.

Click **Add Contribution** to bring up the form for entering contributions (shown here).

Date	5 / 22 / 2009	Date of item (mm/dd/yyyy)
Contributor Name	Last <input type="text"/> First <input type="text"/> Middle <input type="text"/>	Enter last name or company name if a business
Address 1	<input type="text"/>	
Address 2	<input type="text"/>	
City	<input type="text"/> ST <input type="text"/> Zip <input type="text"/>	
Amount \$	<input type="text"/>	
Contributor Type	Individual	Select the type that best describes this contributor
Contributor Occupation	<input type="text"/>	The occupation of the contributor is only required if the amount is over \$100
Contribution type	Cash	Per F.S. 106.09 effective 01/01/08 - A person may not make or accept a cash contribution in excess of \$50.
In-kind Description	<input type="text"/>	Type the description of any In-kind contribution.
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>		

Adding a new contribution is easy.

If the contributor uses a suffix (Jr, Sr, III) either omit the suffix or omit the comma

John **Smith Jr**
John **Smith III**
John **Smith**

If the contributor is an organization instead of an individual, enter the organization name in the **Last** field.

Leave the **First** and **Middle** fields blank.

Address IS Required: Address can be a business, residence or mailing address including PO Boxes. You **must** list a complete address.

Protected Address Status: Contributions from persons with protected address status are shown in reports with the notation *****Protected***** in place of the address.

The Campaign Financial Reporting system scans the county's voter registration database for voters with protected addresses and automatically redacts those addresses from campaign reports, so they cannot be seen by the public.

The screenshot shows a web form for adding a contribution. Red arrows point to the 'Date' field (8/18/2014), the 'Contributor Name' fields (Last, First, Middle), the 'Address 1' field, the 'City' field, the 'Contributor Type' dropdown menu (showing 'Individual' selected), the 'Contribution type' dropdown menu (showing 'Cash' selected), and the 'Submit' button. A blue column on the right contains several tips: 'Most of the entry fields are self-explanatory. **The blue column has tips on what's required.**', 'Contributor Type: Select the Contributor Type. If the candidate is **loaning** personal funds to the campaign, select **Candidate to Themselves.**', 'Select the type that best describes this contributor', 'The occupation of the contributor is only required if the amount is over \$100', 'Per F.S. 106.09 effective 01/01/08 - A person may not make or accept a cash contribution in excess of \$50.', and 'Type the description of any In-kind contribution.' At the bottom, there are 'Submit' and 'Cancel' buttons, and a link that says 'List Contributors'.

When you've completed the form, click **Submit**.

If the system indicates that you have omitted required information, you must provide it before the contribution can be saved.

After the contribution is saved, you'll get another blank form where you can add the next contribution.

Click **Cancel** when you've saved the last contribution you want to add.

Contribution type should be one of following:

Cash

Cash or cashier's check. You may not accept an aggregate cash contribution or contribution by means of a cashier's check from the same contributor in excess of \$50 per election. *You may not accept anonymous cash contributions. A money order or traveler's check is not considered cash.*

Carry Over Funds

This option is for use by state candidates only. Remaining "carry over funds" from an election that has ended.

Check

Traditional paper check, wire transfer, PayPal, credit card, or another type of electronic funds transfer.

In-kind

An item of value other than money or volunteer services.

In-kind Description: Enter a specific description of the in-kind contribution.
Example: *Food and beverage.*

Interest

Money earned on campaign or interest-bearing accounts.

Loan

Money loaned to the campaign rather than a contribution. For example:
"Candidate to Themselves".

Membership Dues

Membership dues regardless of the form (cash, check, etc.). **This option is for use by committees only.**

Money Order

Contribution made by money order.

Multiple Uniform Contributions

This option is for use by committees only. Multiple uniform contributions from the same person.

Refund

Refunds must be entered as a negative amount. Bad checks or contributions returned (in whole or in part) to the contributor.

Recording Multiple Uniform Contributions (Political Committees Only)

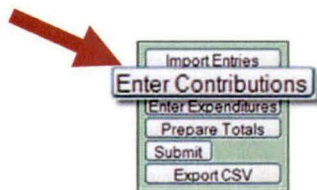
A political committee has the option, PER CALENDAR YEAR, of reporting each contributor's "uniform contribution" (such as membership dues) individually; OR, a political committee may report multiple, uniform contributions (such as membership dues) from the same person, as aggregate (combined) total.

Report the identity of each person making the uniform contribution, to the filing officer, by July 1 of each calendar year. In a general election year, report no later than the 60th day immediately preceding the primary election. For example:

- Monthly dues, \$20 per contributor, therefore, aggregate yearly contribution for each contributor is \$240 per calendar year; (must not exceed \$250 per calendar year for the contributor paying the dues) – their 15 contributors;
- Reported – during the reporting period in which the dues are received;
- Reported as 15 contributors at \$20 each or (15 @ \$20 ea. = \$300);
- Can be reported this way – each reporting period;
- By July 1 each calendar year, in an odd-numbered year; report the identity of each contributor making the uniform contributions;
- Report name and address of each contributor (also include the occupation if the aggregate amount exceeds \$100);
- However, in a general election year, report on or before the 60th day immediately preceding the primary election;

REPORT THE IDENTITY OF CONTRIBUTOR. In odd-numbered years, the committee must report the identity of each contributor by July 1, however, in a gubernatorial or presidential election year; the committee must report the identity of each contributor – no later than the 60th day preceding the Primary Election.

Click



Campaign Treasurer's Report - Itemized Contributions									
Election : County 2015 (2015-11-04)									
Report Date : 2015-6									
(2015-06-01 - 2015-06-30)									
Add Contribution Return to Report List Amend Item from Orig Report									
	Seq Num	Date	Contributor	Contributor Type	Occupation	Contribution Type	In-Kind Description	Amend	Amount
Edit Delete	1	6/2/2015	Marsha Kirk 8899 Hillcrest Drive Palmetto, FL 32312	Individual		Cash		Delete	\$50.00
Edit Delete	2	6/2/2015	Anna Lee Barber 45 Wilson Blvd Palmetto, FL 32312	Individual		Check		Add	\$100.00
Total In Kind									\$0.00
Total Monetary									\$50.00
Total									\$50.00
Add Contribution Return to Report List									

Date: 10 / 10 / 2010

Contributor Name: Last 100 members @ \$20, First, Middle

Address 1: n/a, Address 2: n/a, City: n/a, ST: n/a, Zip: n/a

Amount \$: 2000.00

Contributor Type: Other

Contributor Occupation: multiple uniform contribution

Contribution type: Multiple Uniform Cont

In-kind Description:

When entering Multiple Uniform Contributions as in this example, it is not necessary to fill in the address, HOWEVER, indicate N/A (not applicable) each field as the system will not allow you to enter the contribution if the address fields are blank.

Select the type of contribution: OTHER.

The occupation of contributor: Enter Multiple Uniform Contributions.

Per F.S. 106.09 et seq., contribution in excess of \$500.

Type the description of any In-kind contribution.

Submit Cancel

List Contributors

Campaign Treasurer's Report - Itemized Contributions									
Election : Test Election 1 (2014-08-06)									
Report Date :									
Add Contribution Return to Report List									
	Seq Num	Date	Contributor	Contributor Type	Occupation	Contribution Type	In-Kind Description	Amend	Amount
Edit Delete	1	10/10/2010	100 members @ \$20 n/a n/a n/a, n/ n/a	Other	Membership Dues	Mult Uniform Cont			\$2,000.00
Total									\$2,000.00
Add Contribution Return to Report List									

Click **Edit** to modify details of the transaction.

Delete lets you remove the transaction.

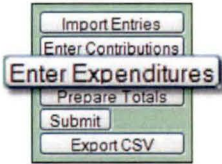
IMPORTANT! If you choose to report MULTIPLE UNIFORM CONTRIBUTIONS in this manner, YOU MUST, in odd-numbered years report the identity of each contributor by July 1; however, in a gubernatorial or presidential election year, you must report the identity of each contributor – no later than the 60th day preceding the Primary Election.

For the purpose of the disclosure requirement, submit the list identifying these contributors in writing and provide each contributor's:

- Name;
- Address;
- City, State and Zip code;
- If multiple uniform contributions, for the calendar year exceed \$100;
 - The contributor's occupation.

Adding expenditures is a similar process.

Click



to bring up a list of the expenditures recorded so far:

Campaign Treasurer's Report - Itemized Expenditures							
Election : County 2015 (2015-11-04)							
Report Date : 2015-6							
(2015-06-01 - 2015-06-30)							
Add Expenditure Return to Report List							
	Seq Num	Date	Vendor	Purpose	Expenditure Type	Amend	Amount
Edit Delete	1	6/4/2015	Davis Communications P.O. Box 3488 Tallahassee, FL 32432	Retainer for advertising.	Monetary		\$500.00
						Total	\$500.00
Add Expenditure Return to Report List							

Click **Edit** to modify details on an existing expenditure.

Delete lets you remove the expenditure.

Takes you back to the Report List.

Click [Add Expenditures](#) to bring up the form for entering expenditures (shown below).

Date	5 / 22 / 2009	Date of item (mm/dd/yyyy)
Vendor Last Name	Last <input type="text"/> First <input type="text"/> Middle <input type="text"/>	Enter last name or company name if a business
Address 1	<input type="text"/>	
Address 2	<input type="text"/>	
City	<input type="text"/> ST <input type="text"/> Zip <input type="text"/>	
Amount \$	<input type="text"/>	
Purpose	<input type="text"/>	Type the purpose of the expenditure.
Expenditure type	Monetary	Please refer to the Campaign Treasurer Handbook for the state of Florida to ensure you are using the correct transaction type.
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>		

If the vendor is an organization rather than an individual, enter the organization name in the **Last** field.
Do not use commas in this field.

Example: Smith, Jr.

Correctly Enter: Smith Jr.

Leave the **First** and **Middle** fields blank.

Date: 8 / 18 / 2014

Vendor Name: Last: [Smith Jr.] First: [] Middle: []

Address 1: []

Address 2: []

City: [] ST: [] Zip: []

Amount \$: []

Purpose: []

Expenditure type: Monetary (selected)

Not sure which **Expenditure Type** to choose?
Click this link to the Dept. of State website for more information.

Type the purpose of the expenditure.

Please refer to the [Campaign Treasurer Handbook](#) for the state of Florida to ensure you are using the correct transaction type.

Cancel

When you've completed the form, click **Submit**.

After the expenditure is saved, you'll get another blank form where you can add the next expenditure.

Click **Cancel** when you've saved the last expenditure you want to add.

If your campaign uses Petty Cash, there are a few things you should know about recording Petty Cash transactions.

In *Expenditure Type*, notice that there are (2) two types for petty cash:

- Use **Petty Cash Withdrawn** when *withdrawing funds* from the campaign account for petty cash. This will add (+) an expenditure to your report.
- Use **Petty Cash Spent** to *record* an expense from the petty cash that has been withdrawn.

NOTE: *Petty Cash Spent* does not add an expenditure to the report because the expenditure was added when *Petty Cash Withdrawn* was recorded. Recording *Petty Cash Spent* is a "detail" only feature.

It's important to keep accurate petty-cash records so your final report will balance.

Expenditure type should be one of the following:

Monetary

General expenditure type used when a specific type does not apply. ***For Example:** Repayment to the candidate for a previously reported loan. This includes remaining funds on the Termination Report that was a Candidate to Themselves Loan.*

Petty Cash Withdrawn

Petty cash withdrawn during a reporting period.

Petty cash expenditures are realized when the funds are withdrawn for petty cash. Therefore, the referenced item is not included in the total. (Sections 106.07 and 106.12, F.S., and Division of Elections Advisory Opinion 06-10)

Petty Cash Spent

Petty cash spent during a reporting period.

Expenditures made from petty cash are not required to be reported individually. (Sections 106.07 and 106.12, F.S., and Division of Elections Advisory Opinion 06-10)

Refund

Refunds must be entered as a negative amount.

A refund of money from a vendor or other source, for example Bond Checks. **Repayment of a Candidate to Themselves loan on the Termination report is NOT a refund.**

Reimbursement

Reimbursements made by campaign check for out-of-pocket expenses. Reimbursements **MUST** have a correlating Distribution. See pages 22-27. **Repayment of a Candidate to Themselves loan on the Termination report is NOT a reimbursement.**

Transfer to Office Account

Funds transferred to an office account when the candidate has been elected. See Section 106.141 Florida Statutes.

Use on
TERMINATION
REPORT ONLY!

Disposition of Funds

Pro-rata refunds to all contributors, donations to 501(c)(3) charitable organizations, donations to the State general revenue fund, or the return of matching funds to the State. Not to be used for Candidate to Themselves Loan repayments.

Use on
TERMINATION
REPORT ONLY!

Disposition of Funds expenditures are for use by candidates only and are only used on Termination Reports. They are not part of the Monthly Total Monetary amounts.

Disposition of Funds to Political Party

Funds given to the political party that the candidate is a member of.

Disposition of Funds expenditures are for use by candidates only and are only used on Termination Reports. They are not part of the Monthly Total Monetary amounts.

Use on
TERMINATION
REPORT ONLY!

Disposition of Funds to Petition Verification

Funds transferred to pay for previously unpaid petition verification fees.

Disposition of Funds expenditures are for use by candidates only and are only used on Termination Reports. They are not part of the Monthly Total Monetary amounts.

Use on
TERMINATION
REPORT ONLY!

A few notes about adding contributions and expenditures...

If you enter a contribution or expenditure outside of the range of the reporting period you are working with, the system will automatically try to find a reporting period that contains that date you are reporting.

If a report for that range is found, the system will let you know.

Transaction Date Not In Selected Report Range

The transaction date you entered (08-04-2015) is not within the date range of the currently selected report. The date range for the report(s) listed below includes the date you entered. You can either...

- Select the correct reporting period from the list below and press the Select button.
- Press the Cancel button to return to the form if you wish to change the transaction date.

☐ 2015-S from: 08/01/2015 to: 08/31/2015

Color legend:
Report is available
Amendment will be created

Select Cancel

Click the report that you would normally have filed the transaction under and then click Select.

If the contribution or expenditure date falls within the date range of a report that has already been filed, you can add the contribution or expenditure to the report and file an amended report in one easy step.

Transaction Date Not In Selected Report Range

The transaction date you entered (05-04-2015) is not within the date range of the currently selected report. The date range for the report(s) listed below includes the date you entered. You can either...

- Select the correct reporting period from the list below and press the Select button.
- Press the Cancel button to return to the form if you wish to change the transaction date.

☐ 2015-5 from: 05/01/2015 to: 05/31/2015

Color legend:
Report is available
Amendment will be created

Select Cancel

Click the report that you would normally have filed the transaction under and then click Select. A confirmation message will appear letting you know that the amended report has been filed.

If no report exists that includes the date you are trying to report on, the system will let you know that too.

Transaction Date Not In Selected Report Range

The transaction date you entered (03-04-2015) is not within the date range of the currently selected report. No report could be located that includes the date you provided. Please change the transaction date or contact our Campaign Finance Administrator for assistance.

Close

Click Close and then either change the transaction date or contact the Qualifying Department for assistance.

Want to see how the report is adding up? Just do a preview.

It is a good idea to preview the report before you submit it in order to catch any data entry errors, missing transactions, or other anomalies. However, previewing the report is not required.

You can preview a report as many times as you like, make changes, and preview it again until you are confident it is correct and complete, then you can submit the finished report to the Elections Office. Once a report has been submitted, the original cannot be changed, so, you want to be sure you preview each report carefully.

Previewing a report DOES NOT submit the report to the Elections Office.

To preview your report:

Click



and this page will appear:

Prepare Totals

NOTE: This is NOT your OFFICIAL report -- it is a PREVIEW ONLY.
After your review, you must use the
CREATE FINAL REPORT FOR REVIEW
button to generate your final report and then you must assign
your PINs to the report to officially file your report with our office.

Candidate : Carolyn J. Casadonte (312) Office : County Commission, District 3
Report Period 06/01/2015-06/30/2015 Due Date 7/10/2015
Contributions \$50.00 Expenditures \$0.00
Transfers \$1,500.00 Distributions \$0.00

Click on the 'Prepare Totals' button below to prepare the report totals.

Once this is done, you can Preview the report from the report menu.



Click **Prepare Totals** to total the contributions and expenditures for this reporting period. You'll be returned to the Report List, which now has a banner like this:

Report (6/1/2015 - 6/30/2015) Preview is ready


NOTE: This is NOT your OFFICIAL report -- it is a PREVIEW ONLY.
You must still generate and submit your final report after you complete your review.

Your output PDF file (./pdf_cfetraining/e60c312_6_dhc691sdc359.pdf) has been produced and is available to be previewed.

[Preview](#)

To view this report, you will need Adobe Acrobat

You only need to install Adobe Acrobat one time. If you have not previously installed Adobe Acrobat, click here to download it



If you haven't installed Acrobat Reader on your machine, you must do it now.

Click the Acrobat Reader icon to go to the download site.

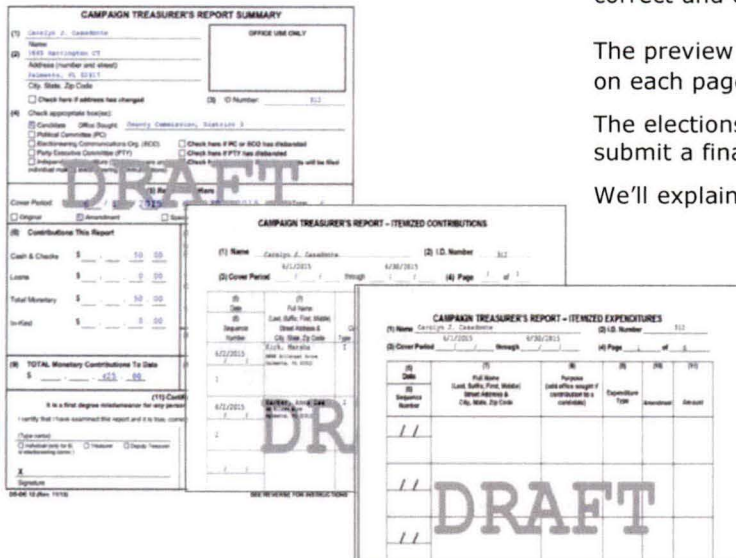
Click [Preview](#) in the banner to bring up a PDF of your report. Check the draft report carefully to verify everything is correct and complete.

Check the draft report carefully to verify everything is correct and complete.

The preview version of the report has a **DRAFT** watermark on each page.

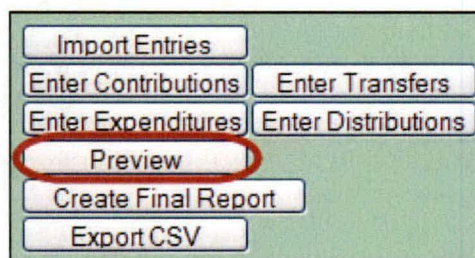
The elections office cannot accept a draft report. You must submit a final report.

We'll explain how to do this on [page 34](#).



Forgot to add a contribution or expenditure? That's OK: You can continue to add them after doing the preview.

On the Report List, notice that the Prepare Totals button is now labeled **Preview**.



You can click **Preview** at any time you want to look at the report. If transactions are added, the button label will switch back to **Prepare Totals**, which means you need to total the new transactions into the report before you can preview it again.

How do I record a distribution?

The Campaign Financial System records a distribution as a DETAIL transaction; all Reimbursements must have a corresponding Distribution. Distributions do not add to your report totals. When a distribution is made, that relates directly to a previously reported expenditure, the subsequent transaction must be reported.

Distributions are used only to report full or pro-rata amounts of an already recorded expenditure in order to provide detail for:

- Reimbursements;
- Pro-rata refunds to contributors;
- Donations to a charitable organization or organizations that meet the qualifications of s. 501(c)(3) of the Internal Revenue Code;
- Contributions to the political party of which the candidate is a member;
- Donation, in the case of a candidate for an office of a political subdivision, to such political subdivision, to be deposited in the general fund.

REIMBURSEMENTS

- Reimbursements for out-of-pocket expenses, in connection with a campaign will be detailed in **Enter Expenditures** as shown on *pages 15-16*. A candidate, campaign or committee volunteer, campaign manager, consultant etc., may request reimbursement for a purchase made with personal funds.
 - *For example:* Candidate Smith paid for printing of campaign signs with his own money. A check to reimburse him for the cost would be recorded as an **Expenditure** and the detail of where Candidate Smith paid for printing would be recorded as a **Reimbursement**.
- An in-kind contribution may be reimbursed at any time during the candidate's campaign or at any time in the case of (committee, party or organization). If the in-kind contribution was in the form of a purchase that was initially "donated" to the campaign, the person requesting reimbursement **MUST** provide a receipt to the treasurer for the original purchase that was given in-kind. The treasurer may then reimburse the individual for the in-kind contribution.
- Contributions in-kind to a candidate's campaign, *except those made by the candidate him/herself*, MAY NOT exceed the contribution limit. *Note: The candidate does not have a contribution limit for monetary or in-kind contributions from him/herself.*
 - *For Example:* A campaign volunteer purchases office supplies from his/her personal funds for the candidate's campaign or for the committee, party or organization.
 - The campaign volunteer requests reimbursement, for the purchase.
 - The campaign volunteer must provide, the campaign treasurer, a receipt for the purchase.
 - The treasurer reimburses the campaign volunteer for the purchase by check drawn on the campaign account. Record the reimbursement, to the volunteer, as an expenditure.

- Record the Distribution by detailing the vendor to which the campaign volunteer originally made payment—along with the purpose of the payment. The detail will reference the original expenditure. For example, the volunteer made the purchase at an office supply store. You will detail the date of the purchase, name and address of the office supply store, the amount of the transaction, purpose and the **Related Expenditures**.

- The **Related Expenditures** information will include the Year, Report Type, and Line

(sequence) number.

Related Expenditures	Year	Report	Line

PREPAID DISTRIBUTIONS

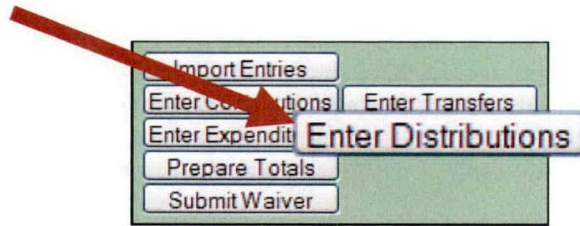
- Prepaid Distributions by candidates, political parties and committees or electioneering organizations will be detailed in [Enter Distributions](#).

For example: Up-front, lump sum payments to be disbursed to different entities at a later date such as payment to a media consultant who then makes disbursements to newspapers and television stations. Disbursements related to the lump-sum payment will be reported as distributions and linked to the expenditure as they occur.

- Political parties and committees initiate distributions in the same manner. For example:
- A political party or committee purchases \$10,000 in printing services from an advertising agency.
- The political party or committee will record this purchase as an expenditure to the advertising agency.
- The political party or committee intends to reallocate the \$10,000 of printing services to several candidates that the political party or committee is supporting. The political party or committee may allocate a portion of the original \$10,000 in printing services while adhering to the contribution limits imposed on the candidate.
- The political party or committee allocates – from the \$10,000 – to “Candidates A, B and C”, \$1,000 for printing services to be used through the advertising agency. The political party or committee will record the distribution to “Candidates A, B and C” as a DETAIL only. The detail will include each candidate’s name and address along with the purpose of the distribution.
- Each candidate will record the \$1,000 distribution from the political party or committee on his campaign reports as an in-kind contribution in the reporting period received.
- In the above scenario, the political party or committee records the original purchase of \$10,000 of printing services as an expenditure.
- Each time the political party or committee allocates a portion of the \$10,000 to a candidate, the political party or committee must record the allocation as a distribution.
- Record each distribution with a reference to the original expenditure the political party or committee made to the advertising agency.
- A distribution to candidate, by a political party, must indicate that the distribution is **ALLOCABLE** or **NON-ALLOCABLE** toward the contribution limits authorized in Section 106.08(2)(a)(b) Florida Statutes.

To record a distribution:

Click



to bring up a page that describes the requirements for a distribution transaction.

You will now see this page:

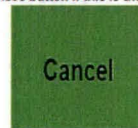


You are about to enter a **Distribution** transaction. The current transaction is a **Distribution** only if it is:

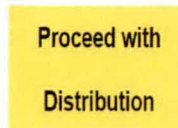
- A **Credit Card Payment** - linked to the expenditure that represents payment of the credit card bill on which the purchase appears. (Reserved for Statewide Candidates Only).
or
- A **Prepaid Distribution**
- used to itemize previously made lump sum payments. Example: Payment to a media consultant who will then make disbursements to various media such as a newspaper, radio or television station. The **Other Distribution** entries will document how the media consultant is spending the lump sum payment. Items will be reported and linked to the pre-paid expenditure as they occur.
or
- A **Reimbursement** - itemized reimbursement for authorized expenses made in connection with the campaign. Example: Candidate Smith paid for the cost of printing campaign signs with his own money. The signs were purchased at ABC Printing. This entry would provide the name and address of ABC Printing and how much was spent. It will be related to an expenditure showing reimbursement to the candidate.

A Distribution transaction does NOT add to your report totals - these transactions are only used to report pro-rata amounts of an already recorded Expense transaction.

NOTE: If you are dispersing funds at the end of your campaign back to contributors or other authorized entities (typically in a TR report), you should be entering an Expense transaction with an item type of **DD** for Disposition of Funds, one for each contributor. Please Cancel this page and select the Enter Expenses button if this is the case.



OR



Click [Proceed with Distribution](#) to see the next page:

Candidate : XYZ PC TEST FILE (871)
Office : POLITICAL COMMITTEE

[Help](#)

Campaign Treasurer's Report - Itemized Distributions						
Election : 2019 POLITICAL ACTION COMMITTEE (2019-03-05)						
Report Date : 2018-M5						
(2018-05-01 - 2018-05-31)						
Add Distribution Return to Report List Amend Item from Orig Report						
Seq Num	Date	Vendor	Purpose	Related Expenditures	Amend	Amount
				Total		\$0.00
Add Distribution Return to Report List						

* Petty cash expenditures are realized when the funds are withdrawn for petty cash. Therefore, the referenced item is not included in the total.

** Disposition of Funds expenditures are only used on Termination Reports and are not part of the Monthly Total Monetary amounts. Therefore, the referenced item is not included in the total expenditures on this page.

This is the list of individual expenditure items on the financial report. To add a new expenditure, click the 'Add expenditure' link above. You may also click the Edit or Delete link for an item to modify the item or to delete it entirely.

This page should come up:

Candidate : XYZ PC TEST FILE (871)
Office : POLITICAL COMMITTEE

[Help](#)

Campaign Treasurer's Report - Itemized Distributions						
Election : 2019 POLITICAL ACTION COMMITTEE (2019-03-05)						
Report Date : 2018-M5						
(2018-05-01 - 2018-05-31)						
Add Distribution Return to Report List Amend Item from Orig Report						
Seq Num	Date	Vendor	Purpose	Related Expenditures	Amend	Amount
				Total		\$0.00
Add Distribution Return to Report List						

Click [Add Distribution](#) to bring up the form for entering distributions.

If the entity receiving the distribution is an organization rather than an individual, enter the organization name in the **Last** field.

Enter the amount and the purpose of the distribution. **For committees**, if the distribution is a contribution to a candidate, be sure to indicate the office they are running for.

Date	10 / 1 / 2009	Date of item (mm/dd/yyyy)
Vendor Name	Last <input type="text"/> First <input type="text"/> Middle <input type="text"/>	Enter last name or company name if a business
Address 1	<input type="text"/>	If the distribution is related to a previously reported expenditure, enter: <ul style="list-style-type: none"> • The year when the expenditure was reported. • The <i>Report Type</i> from the first page of the report (example, M4). • The <i>Sequence Number (Line)</i> (from the first column of the report's expenditures page).
Address 2	<input type="text"/>	
City	<input type="text"/> ST <input type="text"/> Zip <input type="text"/>	
Amount \$	<input type="text"/>	
Purpose	<input type="text"/>	
Related Expenditures	Year <input type="text"/> Report <input type="text"/> Line <input type="text"/>	For each distribution that is related to an itemized expenditure previously listed on Expenditure Report, enter the Year, Report Code, and Sequence Number associated with the expenditure. //

For committees, with the *Purpose*, indicate if the distribution is **ALLOCABLE** or **NON-ALLOCABLE**, toward the statutory contribution limits imposed on a political party contributing to a candidate.

When you've completed the form, click **Submit** to save the information. After the distribution is saved, you'll get another blank distribution form.

Click **Cancel** when you've saved the last distribution entered. You'll see the distributions you added highlighted in yellow, as seen on the next page.

You'll see the distributions you added highlighted in yellow, as in the example below.

Campaign Treasurer's Report - Itemized Distributions							
Election : County 2015 (2015-11-04) Report Date : 2015-6 (2015-06-01 - 2015-06-30) Add Distribution Return to Report List							
	Seq Num	Date	Vendor	Purpose	Related Expenditures	Amend	Amount
Edit Delete	1	6/4/2015	Eric Wu Campaign Account 222 South Street Tallahassee, F 32432	Mailouts	2015~2015-6~2		\$500.00
						Total	\$500.00
Add Distribution Return to Report List							

Click **Edit** to modify details on an existing distribution.

Delete lets you remove the distribution.

Takes you back to the Report List

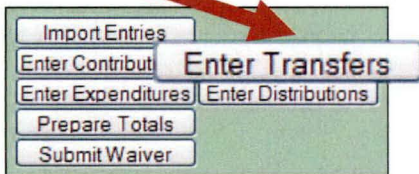


What about fund transfers?

The system allows you to record a fund transfer. A Fund Transfer occurs when transferring funds from the campaign account to an identified account or transferring the funds from the identified account back to the campaign account such as reporting the transfer of funds between the primary depository and separate interest-bearing accounts.

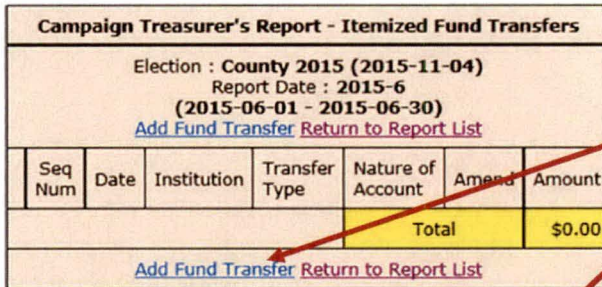
The campaign treasurer or a deputy campaign treasurer may deposit any funds which are in the primary campaign depository and, not currently needed for the disbursement of expenditures, into a separate interest-bearing account in any bank, savings and loan association, or credit union authorized to transact business in Florida.

Click



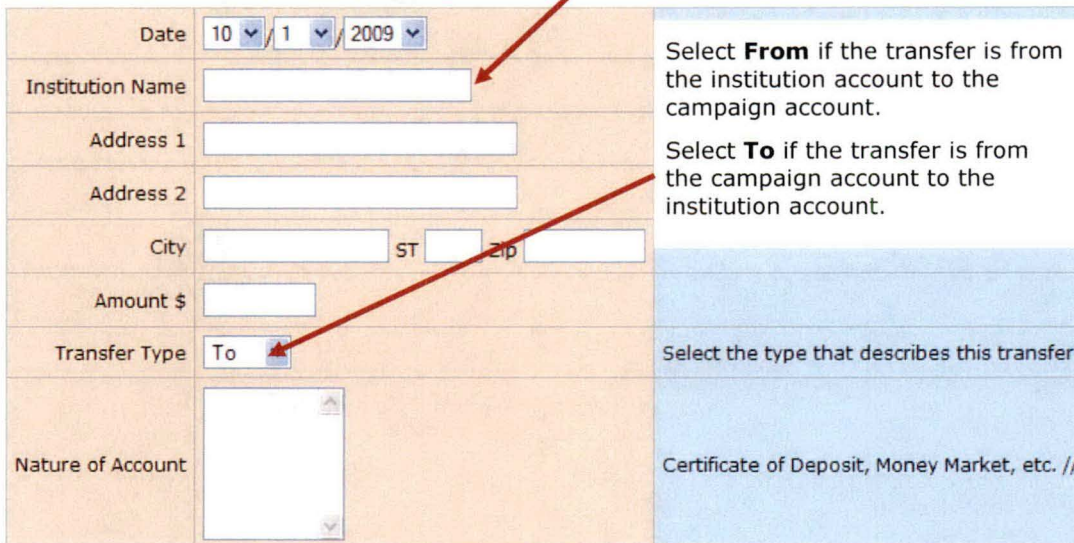
A screenshot of a software menu with several buttons: 'Import Entries', 'Enter Contributions', 'Enter Expenditures', 'Prepare Totals', 'Submit Waiver', 'Enter Transfers', and 'Enter Distributions'. A red arrow points to the 'Enter Transfers' button.

to bring up this page:



A screenshot of a web page titled 'Campaign Treasurer's Report - Itemized Fund Transfers'. It shows election details for 'County 2015 (2015-11-04)' and a report date of '2015-6 (2015-06-01 - 2015-06-30)'. Below this is a table with columns: Seq Num, Date, Institution, Transfer Type, Nature of Account, Amend, and Amount. The table has one row with 'Total' and '\$0.00'. At the bottom are links for 'Add Fund Transfer' and 'Return to Report List'.

Click **Add Fund Transfer** to bring up the form for entering transfers. Enter the financial institution where the account is held.



A screenshot of the 'Add Fund Transfer' form. It includes fields for Date (10/1/2009), Institution Name, Address 1, Address 2, City, ST, Zip, Amount \$, Transfer Type (set to 'To'), and Nature of Account. To the right of the form are instructions: 'Select **From** if the transfer is from the institution account to the campaign account.', 'Select **To** if the transfer is from the campaign account to the institution account.', 'Select the type that describes this transfer', and 'Certificate of Deposit, Money Market, etc. //'. A red arrow points from the 'Add Fund Transfer' link in the previous screenshot to the 'Add Fund Transfer' form.

When you've completed the form, click **Submit** to save the information. After the transfer is saved, you'll get another blank transfer form.

[List Vendors](#)

Click **Cancel** when you've saved the last transfer you have right now. Transfers are not shown on the Reports List because the funds have simply been moved within the campaign or committee, rather than expended or distributed elsewhere.

How do I import data if I use a different campaign finance reporting software?

Candidates or committees using campaign finance reporting software such as Campaign ToolBox™ can import contribution, expenditure, distribution, and fund-transfer data from a file created by the application directly into the Campaign Financial Reporting system.

When you import data from a file, the transactions are added to the report you are working in. Be sure to review the report prior to submission to verify the data matches what you intended to import and make any adjustments manually.

Don't worry if you happen to import the same file more than once. The system will import only the transactions it doesn't already have. It won't duplicate existing transactions.

Import File Requirements

The system can import any file that meets the Division of Elections Campaign Finance Reporting File Specifications:

[Dos.myflorida.com/elections/candidates-committees/campaign-finance/filing-campaign-reports/](https://dos.myflorida.com/elections/candidates-committees/campaign-finance/filing-campaign-reports/)

For a list of State-approved software vendors for electronic filing, see:

[Dos.myflorida.com/elections/candidates-committees/campaign-finance/filing-campaign-reports/vendors/](https://dos.myflorida.com/elections/candidates-committees/campaign-finance/filing-campaign-reports/vendors/)

To import data for the current reporting period:

On the main page, locate the row for the current reporting period (look for the green row) and click **Import Entries**.


Current reporting period is shown in green.

Candidate Reports				
Election : County 2015 (2015-11-04)				
Past Reporting Periods Current Reporting Periods Future Reporting Periods				
Rpt Date	Total Contrib	Total Exp	Status	
2015-5 (05/01/2015 - 05/31/2015) 6/3/2015	\$50.00 (1 item)	-	Submitted #1088116 Unlock this report	<div>View Contributions View Transfers View Expenditures View Distributions Print Amend Export CSV</div>
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	\$1,000.00 (2 items)	Not Filed Data Entry Started (1) distribution item(s)	<div>Import Entries Enter Contribution Enter Transfers Enter Expenditure Enter Distributions Prepare Totals Create Final Report For Review Export CSV</div>
2015-7 (07/01/2015 - 07/31/2015) 8/10/2015	\$50.00 (1 item)	-	Submitted #1073251 Unlock this report	<div>View Contributions View Transfers View Expenditures View Distributions Print Amend Export CSV</div>

Import Entries brings up the **Upload Report** page.


On the **Upload Report** page, click **Browse...** and find the file you want to import. Then click **Upload Report**.

Upload Report (State Campaign Finance Standard Format)

Name of file to import. 

Upload this file:
C:\Reports\May 2015.rpt **Browse...**

Upload Report

Click **Upload Report** to import the file into the system.  Use the **Browse** button to locate the file to upload and then click on the 'Upload Report' button.

Return to Report List

You'll see a display of the transactions imported from the file, as in this example:

Candidate Financial system - Upload Report - Windows Internet Explorer

https://www.voterfocus.com/ws/WS cand/candidate_pb.php?op=u


Candidate Financial system - Upload Report


File Upload - County :

File:cpt_erica_96_125.rpt
Size:5474

Report uploaded successfully

[Return to Reports List](#)

Contributions 

Expenditures 

Contribution: 000001~2004-07-02~CLW Realty Asset Group ~ ~ ~ ~500 CH
Contribution: 000002~2004-07-02~Rogers ~ ~Joanna ~ ~250 CH
Contribution: 000003~2004-07-02~Winchester ~ ~Pam ~ ~50 CH
Contribution: 000004~2004-07-08~Loos ~ ~Karen ~M. ~50 CH
Contribution: 000005~2004-07-08~National Realty Associate, Inc. ~ ~ ~ ~100 CH
Expenditure: 000001~2004-07-02~Type Monkeys, Inc. ~ ~ ~ ~871.9 MO
Expenditure: 000002~2004-07-02~Tafuro ~ ~Vinny ~ ~59.2 MO
Expenditure: 000003~2004-07-06~Aspire Attire ~ ~ ~ ~144 MO

When you've finished importing entries for the reporting period, preview and submit the report as described on [page 20](#) and [page 21](#).

To import data for a past reporting period:

If you've already submitted the report for the past reporting period, you'll need to unlock it and create an amendment. Then you will need to unlock the amendment and do an Import Entries command, following the instructions on [page 38](#).

To import data for a future reporting period:

Unlock the reporting period and do an Import Entries command, following the instructions on [page 29](#).

Finished entering all data? Then submit the report.

IMPORTANT

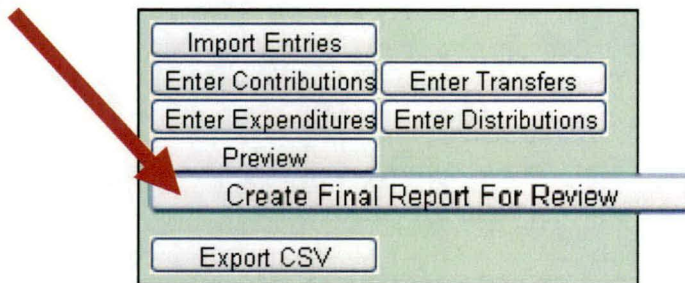
Make sure you have entered ALL contributions and expenditures correctly *before* you click **Submit Report**.

Clicking **Submit Report** closes the report.

Once you have done this, the report cannot be changed, although it can be amended. We'll look at amendments beginning on page 38.

To finalize the report:

Click



Import Entries
Enter Contributions Enter Transfers
Enter Expenditures Enter Distributions
Preview
Create Final Report For Review
Export CSV

to bring up instructions:

Create Final Report For Review

Candidate : **Carolyn J. Casadonte (312)** Office : **County Commission, District 3**

Report Period **06/01/2015-06/30/2015** Due Date **7/10/2015**

Contributions **\$425.00** Expenditures **\$500.00**

Transfers **\$0.00** Distributions **\$0.00**

By submitting this campaign finance report that the same is considered to be certified as to correctness within the meaning of Section 106.07(5) Florida Statutes, by the candidate and the candidates treasurer, in the case of a candidate, or the political committee's chair and treasurer, in the case of a political committee or county executive committee, and that such persons are subject to the provisions of Section 106.07(5) Florida Statutes.

PLEASE NOTE: This report is NOT filed until it is electronically signed by the Candidate/Committee and Treasurer using their respective electronic PIN.

Create Final Report For Review

Cancel

Are your entries for this reporting period finished?

If not, click **Cancel**.

If you are ready to file, click **Create Final Report For Review**.

Clicking **Create Final Report For Review** brings up the Electronic Signature PINs page with a reminder that the report has not yet been submitted.

Report created for your final review.

Preview Report Created: 2015-07-6 10:26:09 (Eastern)

Scroll down to see the report

**This report has not yet been submitted to the Supervisor of Elections.
To submit the report, assign both PINs as described below.**

Reporting Period: 6 (6/1/2015 - 6/30/2015)

Electronic Signature PINs

To signify your approval of this report, enter your PIN in the appropriate field and click **Assign PIN**. Once both PINs have been assigned, the report will be submitted to the Supervisor of Elections.

If both parties are present, both PINs can be assigned now. Or you can assign your PIN now and the other party can enter theirs later during their own session.

If you do not want to assign a PIN at this time, click **Later**.

If the report needs modification, click **Undo Final Report**. This will unlock the report so you can make the necessary changes and recreate a new final report for PIN assignment and submission.

Candidate Committee Electronic Signature PIN	As required in F.S. 106.0705(4), I, as candidate or political committee chair, certify that I have examined this report and it is true, correct, and complete.	<input type="text"/>
Treasurer Electronic Signature PIN	As required in F.S. 106.0705(4), I, as campaign treasurer for this candidate committee, certify that I have examined this report and it is true, correct, and complete.	<input type="text"/>
	Click Assign PIN to assign the PIN you entered above to the report. When both PINs have been entered in the above fields, clicking Assign PIN submits the report to the Supervisor of Elections.	<input type="button" value="Assign PIN"/>
	Click Later if you want to come back later to assign a PIN. The report is now locked and cannot be modified.	<input type="button" value="Later"/>
	Click Undo Final Report to remove all PINs and unlock the report. This will allow you to make modifications to the report.	<input type="button" value="Undo Final Report"/>

CAMPAIGN TREASURER'S REPORT SUMMARY

(1) Carolyn J. Casadonte
Name
(2) 1645 Harrington CT
Address (number and street)
Palmetto, FL 32317
City, State, Zip Code

OFFICE USE ONLY
ONLINE SUBMISSION
[1088118]

Submitted on:
6/4/2015 16:25:24 (eastern)

...followed by a view of the report.

On the PINs page, you have these options:

- Enter both PINs in the space provided and click **Assign PIN** to submit the report to the Supervisor of Elections.

Enter Candidate's PIN → [.....]

Enter Treasurer's PIN → [.....]

Then, click → [Assign PIN]

- Enter just one of the PINs and click **Later**. This will return you to the report list.

Enter Candidate's
or
Treasurer's PIN → []

Then, click → [Assign PIN]
[Later]

The message **Signature (PINs) Required** will appear in the report's **Status** column and the report will be locked, which means no changes can be made.

When the report is ready to be signed with the other PIN, click **Assign PIN(s)** to bring up the PIN page again.

Enter the missing PIN and click **Assign PIN** to submit the report to the Supervisor of Elections.

Report Created
Signature (PINs) Required

[Assign PIN(s)] [Undo Final Report]

[View] [View] [Print] [Edit]

- Click **Undo Final Report** if you want to remove the PINs and unlock the report so you can make changes.

Let's look at a submitted report.

The DRAFT watermarks are now gone...

and your confirmation number is displayed in the **Office Use Only** box along with the date and time you submitted the report.

CAMPAIGN TREASURER'S REPORT SUMMARY

(1) Name: Carolyn J. Casadonte
 (2) Address (number and street): 1645 Harrington CT
 Palmetto, FL 32317
 City, State, Zip Code
☐ Check here if address has changed
 (3) ID Number: 312
 (4) Check appropriate box(es):
☒ Candidate Office Sought: County Commission, District 3
☐ Political Committee (PC)
☐ Electioneering Communications Org. (ECO)
☐ Party Executive Committee (PTY)
☐ Independent Expenditure (IE) (also covers an individual making electioneering communications)
☐ Check here if PC or ECO has disbanded
☐ Check here if PTY has disbanded
☐ Check here if IE has disbanded

OFFICE USE ONLY
 ONLINE SUBMISSION
 [1088118]
 Submitted on: 6/4/2015 16:25:24 (eastern)

(5) Report Identifier
 Cover Period: From 6/1/2015 To 6/30/2015
☒ Original ☐ Amendment ☐ Special Election

(6) Contributions This Report
 Cash & Checks \$ 150.00
 Loans \$ 0.00
 Total Monetary \$ 150.00
 In-Kind \$ 300.00
 (9) TOTAL Monetary Contributions To Date \$ 250.00

(11) Certification
 I certify that I have examined this report and it is true, correct, and complete.
 (Type name) _____ (Type name) _____
☐ Individual (only for IE or electioneering comm.) ☐ Treasurer ☐ Deputy Treasurer ☐ Candidate
 X _____ X _____
 Signature Signature
 DS-DE 12 (Rev. 11/13)

CAMPAIGN TREASURER'S REPORT - ITEMIZED CONTRIBUTIONS

(1) Name: Carolyn J. Casadonte (2) I.D. Number: 312
 (3) Cover Period: 6/1/2015 through 6/30/2015 (4) Page: 1 of 1

(5) Date	(6) Sequence Number	(7) Full Name (Last, Suffix, First, Middle) Street Address & City, State, Zip Code	(8) Contributor Type Occupation	(9) Contribution Type	(10) In-Kind Description	(11) Amendment	(12) Amount
6/4/2015	1	Bardew, Anna Lee 45 Wilson Blvd Palmetto, FL 32312	2	CN			100.00
6/2/2015	2	Firk, Marsha 4899 Willowood Drive Palmetto, FL 32312	1	CA			150.00

CAMPAIGN TREASURER'S REPORT - ITEMIZED EXPENDITURES

(1) Name: Carolyn J. Casadonte (2) I.D. Number: 312
 (3) Cover Period: 6/1/2015 through 6/30/2015 (4) Page: 1 of 1

(5) Date	(6) Sequence Number	(7) Full Name (Last, Suffix, First, Middle) Street Address & City, State, Zip Code	(8) Purpose (add office sought if contribution to a candidate)	(9) Expenditure Type	(10) Amendment	(11) Amount
6/4/2015	1	Devia Communications, P.O. Box 3488 Tallahassee, FL 32302	retainer for advertising	HO		1000.00
6/4/2015	2	Devia Communications, P.O. Box 3488 Tallahassee, FL 32302	retainer for	HO		1000.00

CAMPAIGN TREASURER'S REPORT - ITEMIZED DISTRIBUTIONS

(1) Name: Carolyn J. Casadonte (2) I.D. Number: 312
 (3) Cover Period: 6/1/2015 through 6/30/2015 (4) Page: 1 of 1

(5) Date	(6) Sequence Number	(7) Full Name (Last, Suffix, First, Middle) Street Address & City, State, Zip Code	(8) Purpose (add office sought if contribution to a candidate)	(9) Related Expenditures	(10) Amendment	(11) Amount
6/4/2015	1	Eric Wu Campaign Account 222 South Street Tallahassee, FL 32302	ballots	2015-2015-6-2		1500.00

CAMPAIGN TREASURER'S REPORT - ITEMIZED DISTRIBUTIONS

(1) Name: Carolyn J. Casadonte (2) I.D. Number: 312
 (3) Cover Period: 6/1/2015 through 6/30/2015 (4) Page: 1 of 1

(5) Date	(6) Sequence Number	(7) Full Name (Last, Suffix, First, Middle) Street Address & City, State, Zip Code	(8) Purpose (add office sought if contribution to a candidate)	(9) Related Expenditures	(10) Amendment	(11) Amount
6/4/2015	1	Eric Wu Campaign Account 222 South Street Tallahassee, FL 32302	ballots	2015-2015-6-2		1500.00

Notice that the **Original** box is selected in the **Report Identifier** section.

It indicates that this is the original report for this reporting period.

Should you later file an amendment to this report, the **Amendment** box will be selected instead.

When will my report appear on the elections website?

Lee County reserves the right to review reports before releasing them to the public. Typically, when the report status changes to **Received**, the report is available on the Lee County Supervisor of Elections website. In addition, an email notification will be sent stating whether a report has been accepted OR rejected.

2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	\$1,000.00 (2 items)	Received #1088118	View Contributions	View Transfers
				View Expenditures	View Distributions
				Print	Amend
				Export CSV	

To get to your candidate page, website visitors select your name from the list of candidates running in a selected election. (The elections office will explain how to navigate to this list.)

Candidate selected here.

Election selected here.

Reporting group (Election/Committees) : County 2015 (11/4/2015)

Current reporting group: (Election/Committees): County 2015 (11/4/2015)
(You can select another available reporting group from the above list.)

For additional information on a candidate/committee, click the candidate/committee name link in the list below...

This web site lists candidates for county and local offices and committees/PACs. Candidates for state and multi-county offices are reported on the Division of Elections of the Department of State Website.

Download file available - Complete candidate/committee list with contact details - CSV/Excel formatted.

Information contained within the reports has been generated by and is the sole responsibility of the reporting entity

Office	Candidate	Party	Monetary Contributions	In Kind Contributions	Total Expenditures & Distributions
County Commission, District 3	Carolyn J. Casadonte (Active-)		\$325.00	\$600.00	\$1,500.00

Your candidate page will list all reports that the elections office has released to the website:

Candidate : Carolyn J. Casadonte
Office : County Commission, District 3

Print This Information

Available reports...

6	7/10/2015
6(A)	7/10/2015
7	8/10/2015

Go Back

List All Contributions and Expenditures

Export all transactions (tab delimited - .csv)

Newly received report is listed here.

Display list of all campaign transactions.

The following financial reports are available:

Report	Monetary Contributions	In Kind	Expenditures & Distributions	View PDF
6 (6/1/2015 - 6/30/2015)	\$150.00	\$300.00	\$1,000.00	View Report (PDF)
6 (6/1/2015 - 6/30/2015) Amended	\$125.00	\$300.00	\$500.00	View Report (PDF)
7 (7/1/2015 - 7/31/2015)	\$50.00	\$0.00	\$0.00	View Report (PDF)

Display the report in PDF format.

Website visitors can click **View Report (PDF)** to see the report in PDF format or **List All Contributions and Expenditures** to bring up a list of all transactions reported so far grouped by type as shown on the next page.

Report Date : 7/10/2015							
Campaign Treasurer's Report - Itemized Contributions							
Seq Num	Date	Contributor	Contributor Type	Occupation	Contribution Type	Amend	Amount
1	6/4/2015	Anna Lee Barber 45 Wilson Blvd Palmetto, FL 32312	Individual		Check		\$100.00
2	6/2/2015	Marsha Kirk 8899 Hillcrest Drive Palmetto, FL 32312	Individual		Cash		\$50.00
					Total Contributions		\$150.00
Campaign Treasurer's Report - In-Kind Contributions							
Seq Num	Date	Contributor	Contributor Type	Occupation	In-Kind Description	Amend	Amount
1	6/2/2015	Reid C Smith 344 Henderson Road Palmetto, FL 32312	Individual	Restaurantowner	Lunch for campaign meeting.		\$300.00
					Total In-Kind Contributions		\$300.00
Campaign Treasurer's Report - Itemized Expenditures							
Seq Num	Date	Vendor	Purpose	Expenditure Type	Amend	Amount	
1	6/4/2015	Davis Communications P.O. Box 3488 Tallahassee, FL 32432	Retainer for advertising.	Monetary		\$500.00	
2	6/4/2015	Davis Communications P.O. Box 3488 Tallahassee, FL 32432	Retainer for advertising.	Monetary		\$500.00	
				Total Expenditures		\$1,000.00	
Campaign Treasurer's Report - Fund Transfers							
Seq Num	Date	Institution	Transfer Type	Nature of Account	Amend	Amount	
No Activity This Period							
Campaign Treasurer's Report - Distributions							
Seq Num	Date	Vendor	Purpose	Expenditure Related Exp	Amend	Amount	
1	6/4/2015	Eric Wu Campaign Account 222 South Street Tallahassee, F 32432	Mailouts	2015-2015-6-2		\$500.00	

Contributions from persons with protected-address status are not shown in reports. Instead, the notation *****Protected***** will be seen in place of the address.

The Campaign Financial Reporting system scans the county's voter registration database for voters with protected addresses and automatically redacts those addresses from campaign reports, so they cannot be seen by the public.

If you are aware of a contributor with a protected address who is not in your local county's voter database, please advise your Supervisor of Elections.

Did you know? A photograph and biographical information can also appear on your page, if you choose to provide them. We'll explain how to do this beginning on [page 54](#).

How do I save a copy of the report on my computer?

A copy of all the reports you file will continue to be available on the Campaign Financial Reporting system. If you want to keep a copy on your local computer, just save the PDF to a folder on your computer or network.

To save copy of the report to your computer:

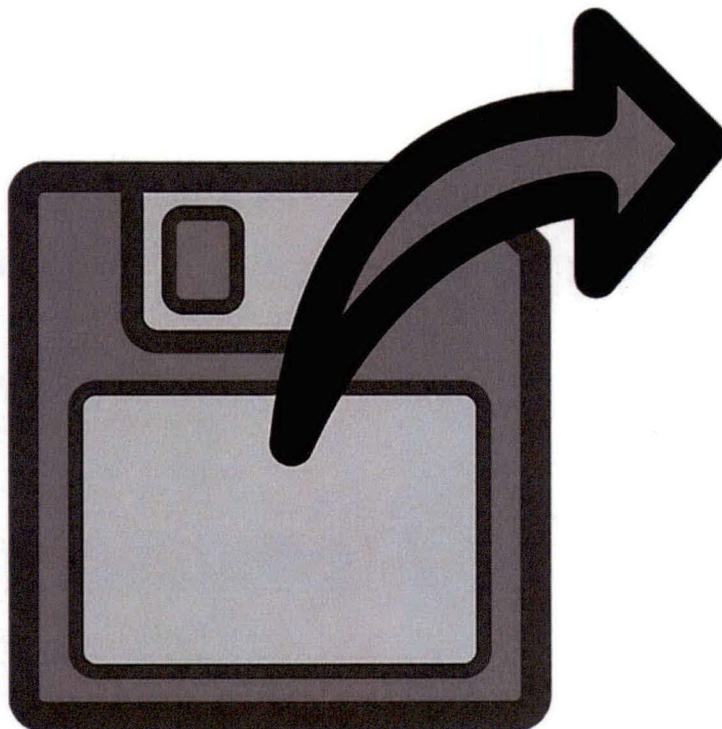
Click



to display a PDF of the report in Acrobat Reader.



Click . Save the PDF to a location on your computer or network. You might consider giving the copy a different file name. Names assigned by the system are cryptic. For example, you can name your report *M6-2015_Filed 07-10-15*.



What about changing a report that's already been filed?

After a report has been submitted to the elections office, you cannot change it, but you can make an amendment. An amendment is a separate report for the reporting period. On the amendment's first page, you'll see a checkmark in the **Amendment** box.

The **Amendment** box is automatically checked when you create an amended report.

CAMPAIGN TREASURER'S REPORT SUMMARY

(1) Carolyn J. Casadonte
Name

(2) 1645 Harrington CT
Address (number and street)
Palmetto, FL 32317
City, State, Zip Code

☐ Check here if address has changed

(3) ID Number: 312

OFFICE USE ONLY
ONLINE SUBMISSION
(1088951)
Submitted on: 7/6/2015 10:50:55 (eastern)

(4) Check appropriate box(es):
☒ Candidate Office Sought: County Commission, District 3
☐ Political Committee (PC)
☐ Electioneering Communications Org. (ECO)
☐ Party Executive Committee (PTY)
☐ Independent Expenditure (IE) (also covers an individual making electioneering communications)

☐ Check here if PC or ECO has disbanded
☐ Check here if PTY has disbanded
☐ Check here if no other IE or EC reports will be filed

(5) Report Identifiers
Cover Period: From 6 / 1 / 2015 To 6 / 30 / 2015 Report Type: 6
☐ Original ☒ Amendment ☐ Special Election Report

(6) Contributions This Report
Cash & Checks \$ 50 . 00
Loans \$ 0 . 00

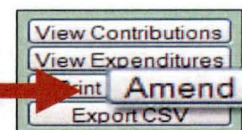
(7) Expenditures This Report
Monetary Expenditures \$ 0 . 00
Transfers to

You can amend a report any time after you submit it. When the original report's status is **Submitted**, you can add new contributions and expenditures, but you cannot change data on the original report. To change original data, the original report's status must be **Received**.

You can create an amendment to a report for any reporting period. The steps to do this are the same for all reporting periods with one exception; for past reporting periods, you must first unlock the report following the instructions beginning on [page 38](#).

To create an amendment to a report in the current reporting period:

In the current reporting period (the green row), click



to bring up this page:

AMEND REPORT

Click Create to create an amended report for the 05/01/2016 - 05/31/2016 report. The amended report will appear in the report list below the original report.

Create

Then click



When the Report List reappears, notice that there's now a new row for the current reporting period.

Candidate Reports					
Election : County 2015 (2015-11-04)					
Past Reporting Periods		Current Reporting Periods		Future Reporting Periods	
Rpt Date	Total Contrib	Total Exp	Status		
2015-5 (05/01/2015 - 05/31/2015) 6/3/2015	\$50.00 (1 item)		Submitted #1088116 Unlock this report	View Contribution View Expenditures Print Export CSV	View Transfers View Distributions Amend
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	\$1,000.00 (2 items)	Submitted #1088118	View Contribution View Expenditures Print Export CSV	View Transfers View Distributions Amend
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015 Amended	\$425.00 (3 items)	\$500.00 (1 item)	Not Filed Data Entry Started	Import Entries Enter Contribution Enter Expenditure Prepare Totals Create Final Report For Review Export CSV	Enter Transfers Enter Distributions
2015-7 (07/01/2015 - 07/31/2015) 8/10/2015	\$50.00 (1 item)		Submitted #1077231 Unlock this report	View Contribution View Expenditures Print Export CSV	View Transfers View Distributions Amend

Enter the new data using these buttons, just like you did on the original report.

To create an amended report, you can:

- Manually enter new contributions (pages 10-11) and expenditures (pages 15-16).
- Import new contributions or expenditures (page 29).
- Change or delete items listed on the original report (page 42).

The totals of items on the amended report are displayed just as they were for the original report.

2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	\$1,000.00 (2 items)	Submitted #1088118	View Contributions View Expenditures Print Export CSV	View Transfers View Distributions Amend
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015 Amended	\$425.00 (3 items)	\$500.00 (1 item)	Not Filed Data Entry Started	Import Entries Enter Contribution Enter Expenditure Prepare Totals Create Final Report For Review Export CSV	Enter Transfers Enter Distributions

When you are finished entering items, preview the report (page 20) and submit it to the elections office (page 31). You'll see a new confirmation number for the amendment.

2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	\$1,000.00 (2 items)	Submitted #1088118	View Contributions View Expenditures Print Export CSV	View Transfers View Distributions Amend
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015 Amended	\$425.00 (3 items)	\$500.00 (1 item)	Submitted #1088118	Import Entries Enter Contribution Enter Expenditure Prepare Totals Create Final Report For Review Export CSV	Enter Transfers Enter Distributions

If you need to change a report after submitting the amendment, a second amended report will be required.

To create an amendment to a report in a past reporting period:

For a past reporting period (the beige row), click **Unlock this report**.

Candidate Reports				
Election : County 2015 (2015-11-04)				
Past Reporting Periods <u>Current Reporting Periods</u> Future Reporting Periods				
Rpt Date	Total Contrib	Total Exp	Status	
2015-5 (05/01/2015 - 05/31/2015) 6/3/2015	\$50.00 (1 item)	-	Submitted #1088116 Unlock this report	View Contributions View Expenditures Print Amend Export CSV View Transfers View Distributions
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	\$1,000.00 (2 items)	Received #1088118	View Contributions View Expenditures Print Amend Export CSV View Transfers View Distributions
2015-7 (07/01/2015 - 07/31/2015) 8/10/2015	\$50.00 (1 item)	-	Received #1073251 Unlock this report	View Contributions View Expenditures Print Amend Export CSV View Transfers View Distributions

When the confirmation message appears, click **OK**.

Are you sure you wish to access a PAST reporting period?

OK

Cancel

The **Amend** button for the past reporting period becomes available.

Candidate Reports				
Election : County 2015 (2015-11-04)				
Past Reporting Periods <u>Current Reporting Periods</u> Future Reporting Periods				
Rpt Date	Total Contrib	Total Exp	Status	
2015-5 (05/01/2015 - 05/31/2015) 6/3/2015	\$50.00 (1 item)	-	Submitted #1088116 Unlock this report	View Contributions View Expenditures Print Amend Export CSV View Transfers View Distributions
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	\$1,000.00 (2 items)	Received #1088118	View Contributions View Expenditures Print Amend Export CSV View Transfers View Distributions

Create an amended report following the instructions for entering transactions on page 36.

What if I didn't mean to create an amended report?

Sometimes that happens.

Step One: If you begin creating an amended report, notice that the list of commands on the Report List includes the command **Delete Report**. To back out of the report, first delete all the transactions if you have entered any for the amended report, if you have not entered any transactions proceed to Step Two.

Campaign Treasurer's Report - Itemized Contributions									
Election : 2019 POLITICAL ACTION COMMITTEE (2019-03-05)									
Report Date : 2015-M10 (2015-10-01 - 2015-10-31)									
Add Contribution Return to Report List Amend Item from Orig Report									
	Seq Num	Date	Contributor	Contributor Type	Occupation	Contribution Type	In-Kind Description	Amend	Amount
Edit Delete	1	10/11/2015	Joe B Voter 2425 Main St Fort Myers, FL 33901	Individual	Teacher	Check		Add	\$300.00
							Total In Kind		\$0.00
							Total Monetary		\$300.00
							Total		\$300.00
Add Contribution Return to Report List									

Step Two: Once there are no transactions for the amended report, click **Delete Report** to delete it from the system.

Not Filed Data Entry Not Started Unlock this report	Import Entries
	Enter Contributions Enter Transfers
	Enter Expenditures Enter Distributions
	Prepare Totals
	Create Final Report For Review
	Delete Report
	Export CSV

How do I change or delete an item on the original report?

First, verify that the status of the original report is **Received**:

2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	\$1,000 (2 items)	Received #1088118	View Contributions	View Transfers
				View Expenditures	View Distributions
				Print	Amend
				Export CSV	

To change data that was entered on the original report, the original report's status must be **Received**.

Secondly, create an Amended Report by following the instructions on [pages 38-40](#).

Next on the Report List, locate the row for the amended report and click [Enter Contributions](#) or [Enter Expenditures](#), depending on the type of item you want to change. In the example here, we are changing an expenditure.

Not Filed Data Entry Started Unlock this report	Import Entries	
	Enter Contributions	Enter Transfers
	Enter Expenditures	Enter Distributions
	Prepare Totals	
	Create Final Report For Review	
	Export CSV	

To change a contribution or expenditure:

On the next page, click **Amend Item from Orig Report**.

Candidate : XYZ PC TEST FILE (871)
Office : POLITICAL COMMITTEE

Help

Campaign Treasurer's Report - Itemized Expenditures

Election : 2019 POLITICAL ACTION COMMITTEE (2019-03-05)
Report Date : **2017-M12**
(2017-12-01 - 2017-12-31)

[Add Expenditure](#) [Return to Report List](#) **[Amend Item from Orig Report](#)**

Seq Num	Date	Vendor	Purpose	Expenditure Type	Amend	Amount
Total						\$0.00

[Add Expenditure](#) [Return to Report List](#)

to bring up a list of items (for example, expenditures) reported in the current month:

To change an item,
highlight it.

The following list is the list
of the items on the original report
that you are amending.

Select the item to amend and you
will be given a screen to enter
the new values for the item.

1 Staples, (2017-12-20) \$60.00

Then click **Amend Item**.

Amend Item

Highlight the item you want to change and click **Amend Item** to bring up the detail page for the item.

Type the changes where they are needed. If you want to delete the contribution or expenditure, simply zero-out the **Amount** field. When you've finished, click .

CANDIDATE : XYZ PC TEST FILE (871) OFFICE : POLITICAL COMMITTEE

Report In Focus: 2017 - M12
Start Date: 2017-12-01 End Date: 2017-12-31

Amend Report - Enter changes to this item

Date	12 ▾ / 20 ▾ / 2017 ▾	Date of item (mm/dd/yyyy)
Vendor Name	Last Staples First <input type="text"/> Middle <input type="text"/>	Enter last name or company name if a business
Address 1	11249 Cleveland Ave	This page shows the details for the item as they were entered into the original report.
Address 2	<input type="text"/>	
City	Fort Myers ST FL Zip 33901	To change an item, make your changes in the appropriate fields whether it be the amount, type or purpose.
Amount \$	60.00	To delete an item, type a zero (0) in the Amount field.
Purpose	Ink	Type the purpose of the item
Expenditure type	Monetary ▾	Please refer to the Campaign Treasurer Handbook for the state of Florida to ensure you are using the correct transaction type.
<div>Submit Cancel and return to list</div> <div>List Vendors</div>		

This page shows the details for the item as they were entered into the original report.

To change an item, make your changes in the appropriate fields whether it be the amount, type or purpose.

To delete an item, type a zero (0) in the **Amount** field.

When finished, click **Submit**.

On the next page, you now have **two entries** (in yellow) representing the changed item. If you do not have two entries, you did not execute the amendment correctly. Do not submit the report if you do not have two entries as it will be rejected:

- The first entry deletes the item as it was filed in the original report. (Notice the word **Delete** in the **Amend** column.)
- The second entry adds the item with the changed values. (The **Amend** column reads **Add**.)

Candidate : XYZ PC TEST FILE (871)
Office : POLITICAL COMMITTEE

[Help](#)

Campaign Treasurer's Report - Itemized Expenditures							
Election : 2019 POLITICAL ACTION COMMITTEE (2019-03-05)							
Report Date : 2017-M12 (2017-12-01 - 2017-12-31)							
Add Expenditure Return to Report List Amend Item from Orig Report							
	Seq Num	Date	Vendor	Purpose	Expenditure Type	Amend	Amount
Edit Delete	1	12/20/2017	Staples Cleveland Ave Fort Myers, FL 33901	Ink	Monetary	Delete	\$60.00
Edit Delete	2	12/20/2017	Staples 11249 Cleveland Ave Fort Myers, FL 33901	Ink	Monetary	Add	\$30.00
					Total		\$-30.00
Add Expenditure Return to Report List							

Deletes the original item.

Adds the changed item in its place.

In the example here, we changed the amount from \$60.00 to \$30.00 which creates a change in the original amount of -\$30.00.

This completes the change to the original item. From here you can change another item, add a new item, or return to the Report List.

If you make a change that will not affect the amount such as changing a name or address (as shown below) the add and delete total will be \$0.00 as shown below:

Candidate : XYZ PC TEST FILE (871)
Office : POLITICAL COMMITTEE

[Help](#)

Campaign Treasurer's Report - Itemized Expenditures							
Election : 2019 POLITICAL ACTION COMMITTEE (2019-03-05)							
Report Date : 2017-M12 (2017-12-01 - 2017-12-31)							
Add Expenditure Return to Report List Amend Item from Orig Report							
	Seq Num	Date	Vendor	Purpose	Expenditure Type	Amend	Amount
Edit Delete	1	12/20/2017	Staples Cleveland Ave Fort Myers, FL 33901	Ink	Monetary	Delete	\$60.00
Edit Delete	2	12/20/2017	Staples 15206 Hanson Ave Fort Myers, FL 33901	Ink	Monetary	Add	\$60.00
Total							\$0.00
Add Expenditure Return to Report List							

Next you will Return to Report List. It should show **TWO** items and will reflect the amount of the total, this example shows \$0.00 as it was for the address change:

2017-M12 (12/01/2017 - 12/31/2017) 1/10/2018 Amended		\$0.00 (2 items)	Not Filed Data Entry Started Unlock this report	Import Entries	
				Enter Contributions:	Enter Transfers
				Enter Expenditures:	Enter Distributions
				Prepare Totals	
				Create Final Report For Review	
				Export CSV	

You can then follow the procedures to submit a report on pages 31-34.

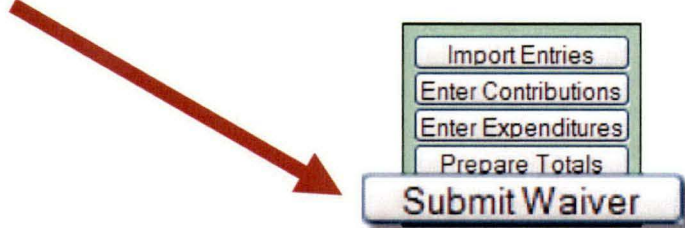
What if I don't have any contributions or expenditures for the period?

You must submit a **Waiver of Report**. A Waiver is a one-page report you submit to the elections office when there are no contributions or expenditures.

WAIVER OF REPORT (Section 106.07(7), F.S.) (PLEASE TYPE)		OFFICE USE ONLY
Carolyn J. Casadonte		96
Candidate's Name (Last, Suffix, First, Middle) OR Political Committee, CCE or Party Name 1645 Harrington CT, Suite C Palmetto, FL 32314		Identification Number (Assigned by Division of Elections)
Address (Number and Street)		County Commission District 4
City	State	Zip Code
<input checked="" type="checkbox"/> Candidate	<input type="checkbox"/> Committee of Continuous Existence	<input type="checkbox"/> Check box if address has changed since last report
<input type="checkbox"/> Political Committee	<input type="checkbox"/> Party Executive Committee	<input type="checkbox"/> Check here if PC or CCE has DISBANDED and will no longer file reports
TYPE OF REPORT (Check Appropriate Box)		
QUARTERLY REPORTS	PRIMARY ELECTION	GENERAL ELECTION
<input type="checkbox"/> January	<input type="checkbox"/> 32nd day prior	<input type="checkbox"/> 48th day prior
<input type="checkbox"/> April	<input type="checkbox"/> 18th day prior	<input type="checkbox"/> 32nd day prior
<input type="checkbox"/> July	<input type="checkbox"/> 4th day prior	<input type="checkbox"/> 18th day prior
<input type="checkbox"/> October		<input type="checkbox"/> 4th day prior
<input type="checkbox"/> TERMINATION REPORT		
<input type="checkbox"/> SPECIAL ELECTION		
NOTIFICATION OF NO ACTIVITY IN CAMPAIGN ACCOUNT FOR THE REPORTING PERIOD OF		
X 7/1/2009 through 9/30/2009 (Q3)		
Signature		Date
SIGNATURES REQUIRED FOR: Candidates Candidates Campaign Treasurer or Deputy Treasurer (s. 106.07(5), F.S.) Political Committees Chairman, Campaign Treasurer or Deputy Treasurer (s. 106.07(5), F.S.) Committees of Continuous Existence Treasurer (s. 106.04(4)(c), F.S.) Party Executive Committees Treasurer or Chairman (s. 106.26(2), F.S.)		
<small>In any reporting period when there has been no activity in the account (no funds expended or received) the filing of the required report is waived. However, the filing officer must be notified in writing on the prescribed reporting date that no report is being filed.</small>		

On the Report List, find the reporting period for which you want to submit a Waiver of Report.

Click



On the next page, click **Create Final Report For Review** to bring up the Electronic Signature PINs page with a reminder that the report has not yet been submitted.

Enter both PINs in the spaces provided and click **Assign PIN** to submit the waiver to the Supervisor of Elections.

Waivers can be amended, just like any other report. So, if you later discover you had contributions or expenditures for a reporting period, simply amend the waiver as you would amend any report (page 38) you may, however, be subject to fines.

Why are some reports locked?

Have you noticed that reports for past and future reporting periods have an **Unlock this report** button?

Candidate Reports				
Election : County 2015 (2015-11-04)				
Past Reporting Periods Current Reporting Periods Future Reporting Periods				
Rpt Date	Total Contrib	Total Exp	Status	
2015-5 (05/01/2015 - 05/31/2015) 6/3/2015	\$50.00 (1 item)		Submitted #1088116 Unlock this report	View Contributions View Expenditures Print Amend Export CSV
2015-6 (06/01/2015 - 06/30/2015) 7/10/2015	\$450.00 (3 items)	\$1,000.00 (2 items)	Received #1088118	View Contributions View Expenditures Print Amend Export CSV
2015-7 (07/01/2015 - 07/31/2015) 8/10/2015	\$50.00 (1 item)		Received #1073251 Unlock this report	View Contributions View Expenditures Print Amend Export CSV

These buttons prevent you from accidentally entering data for the current reporting period into a past or future period.

If you find you need to amend a past report or enter data for a future report, click **Unlock this report**.

For past reporting periods, you'll then get command buttons for amending the report.

2015-5 (05/01/2015 - 05/31/2015) 6/3/2015	\$50.00 (1 item)		Submitted #1088116 Unlock this report	View Contributions View Expenditures Print Amend Export CSV
--	---------------------	--	---	--

And for future reporting periods, you'll see the usual buttons for entering data.

2015-7 (07/01/2015 - 07/31/2015) 8/10/2015	\$50.00 (1 item)		Received #1073251 Unlock this report	View Contributions View Expenditures Print Amend Export CSV
---	---------------------	--	--	--

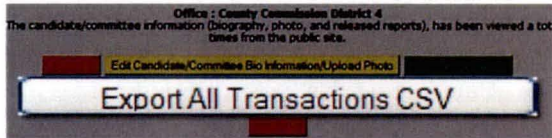


How do I export data to a spreadsheet?

The system has two ways to export your financial data to a Microsoft Excel comma-separated values (CSV) file:



collects all data for the selected report.



collects all data from all reports in this election.

Both options create a file named **CFinExport.csv** in your **C:\Temp** folder.

When you click either button, you'll see a message asking if you want to open or save the file. You can view the file immediately or save it to a different name and location, if you like.

The spreadsheet file contains this information:

- Date the item was recorded
- Whether it's a contribution (C) or an expenditure (E)
- Contributor or vendor name and address
- Contribution type
- Contributor's occupation
- Item type
- Description
- Amount
- Whether the item was recorded in the original report (blank) or an amendment (A)

What reporting is required when a campaign ends? (Candidate's Only)

On the Report List, you will see a section for the termination report, which is the absolute last report that will be submitted by your campaign. This report states the financial status of your campaign after all contributions and expenditures have been reconciled. It should also show how the campaign disposed of surplus funds. At the filing of your Termination Report your Contribution Total and Expenditure Total must match. To see your campaign's current Contributions and Expenditures, follow this link: https://www.voterfocus.com/CampaignFinance/candidate_pr.php?c=lee Unaccounted funds at the time of your Termination Report is a reportable violation.

The termination report might not appear in the Report List at the beginning of the campaign, but the elections office will add it to your reporting dates at the appropriate time. Note that it might not be named *Termination Report*. The elections office can give it any name, such as *2015-Final*, like the example here.

				Prepare Totals Create Waiver
			No Data Entered Unlock this report	Import Entries Enter Contributions Enter Expenditures Prepare Totals Create Waiver
2015-Final (10/01/2015 - 10/31/2015) 11/10/2015	-	-		

When it's time to file the termination report, the row will turn green.

To file this report, you will need to add any outstanding contributions and expenditures that haven't been reported in an earlier report.

If surplus funds remain in the campaign account, the termination report should include an expenditure that disposes of those excess funds. When you enter this expenditure, be sure to select **Disposition of Funds** for the **Expenditure type** unless it's a repayment of a Candidate to Themselves Loan, then it is MONETARY.

Candidate : Carolyn J. Casadonte (312) Office : County Commission, District 3

Report In Focus: 2015 - Final
Start Date: 2015-10-01 End Date: 2015-10-31

Date	10 / 31 / 2015	Date of item (mm/dd/yyyy)	
Vendor Name	Last: Casadonte First: Antonio Middle:	Enter last name or company name if a business	
Address 1	340 Gulf View Drive		
Address 2			
City	Miami	ST	FL Zip 32322
Amount \$	500		
Purpose	Return of unused campaign contributions		
Expenditure type	Disposition of Funds Monetary Petty Cash Withdrawn Petty Cash Spent Transfer to Office Account Refund Disposition of Funds Disposition of Funds to Future Campaign Disposition of Funds to Political Party Disposition of Funds to Petition Verification Reimbursements		

Type the purpose of the expenditure.

Please refer to the Campaign Treasurer Handbook for the state of Florida to ensure you are using the correct transaction type.

To report on the disposition of surplus funds, select one of the **Disposition of Funds** options in the **Expenditure type** field. For a description of each type, see pages 17-18.

Campaigns sometimes confuse
Disposition of Funds
and
Enter Distributions.

A distribution is a transaction that is a type of detail and only refers back to a previously recorded expense.

*****Candidate to Themselves Loans**
will be **MONETARY** expenditures.

When you return to the list of expenditures for the termination report, you will see the item listed, but the amount will not be reflected in the total expenditures for the period for Disposition of Funds Expenditure Types, Monetary Type will still be reflected in the amount.

Nor will the amount be included on the Report List—in the **Total Exp** column—although it will be counted as an “item.” This design is in accordance with Division of Elections requirements. This is because the “Disposition of Surplus Funds” at the close of the campaign is not considered an expenditure under Florida’s campaign finance laws—it is instead a term used to describe the distribution or allocation of surplus funds. Again, Monetary will be reflected.

2015-Final (10/01/2015 - 10/31/2015) 11/10/2015		\$0.00 (1 item)	Not Filed Data Entry Started Unlock this report	Create Waiver Report Import Entries Enter Contributions Enter Transfers Enter Expenditures Enter Distributions Prepare Totals Create Final Report For Review Export CSV
--	--	--------------------	---	---

Preview the report and submit it as you have previous reports for the campaign.

When you look at the report, notice that the Disposition of Funds amount is not reflected in box 7 of the Report Summary page.

(7) EXPENDITURES THIS REPORT	
Monetary Expenditures	\$ 0.00
Transfers to Office Account	\$ 0.00
Total Monetary	\$ 0.00
(8) Other Distributions	

But the amount will be included in box 10 of the Summary Report.

(10) TOTAL Monetary Expenditures To Date
\$ 1,809.78

And it will appear on the Itemized Expenditure page with an expenditure type of DI.


CAMPAIGN TREASURER'S REPORT - ITEMIZED EXPENDITURES					
(1) Name <u>Carolyn J. Casadonte</u>			(2) I.D. Number <u>312</u>		
(3) Cover Period <u>10/1/2015</u> through <u>10/31/2015</u>			(4) Page <u>1</u> of <u>1</u>		
(5) Date	(7) Full Name (Last, Suffix, First, Middle) Street Address & City, State, Zip Code	(8) Purpose (add office sought if contribution to a candidate)	(9) Expenditure Type	(10) Amendment	(11) Amount
10/31/2015	Casadonte, Antonio 340 Gulf View Drive Miami, FL 32322	return of unused campaign contributions	DI		\$560.98

How do I enter a photo and biographical information?

You can place a JPEG file, such as a photo, and descriptive text on the page that voters see when they visit the Campaign Financial Reporting system.

Photo of candidate

Candidate : Carolyn J. Casadonte
Office : County Commission District 4



1645 Harrington CT
Suite C
Palmetto, FL - 32314
cjcasadonte4cc3@gmail.com
850-556-6814
850-422-0585

Carolyn Casadonte's work with neighborhood associations for the past 20 years uniquely qualifies her for the service as a County Commissioner.

[Jump to submitted reports](#)

Available reports...	
Q1	4/15/2009
Q2	7/15/2009
Q2(A)	7/15/2009

She understands the concerns of individual residents in our community and will ensure those concerns are properly prioritized by the County.

Or particular interest to Carolyn is preservation of our outstanding--and irreplaceable--natural environment. While serving as president of the Woodgate Neighborhood Association and chair of the Council of Neighborhood Associations, she worked tirelessly--and effectively--to prevent destruction of in-town neighborhoods' canopy oaks.

Note: The candidate's photograph and statement are supplied by the candidate and are not endorsed by the County Supervisor of Elections.

Biographical information

A photo and text about the candidate or committee are nice to have, but they are not required. If you don't provide them, here is what voters will see:

<Candidate Reports - Candidate Log In> - Windows Internet Explorer

https://www.voterfocus.com

Candidate : Adam Greensburg
Office : Clerk of Court

No Photo Available

6979 Standing Pines Lane
Tallahassee, FL - 32312
agreensburg@hotmail.com
850-556-6814

No biographical information available at this time.

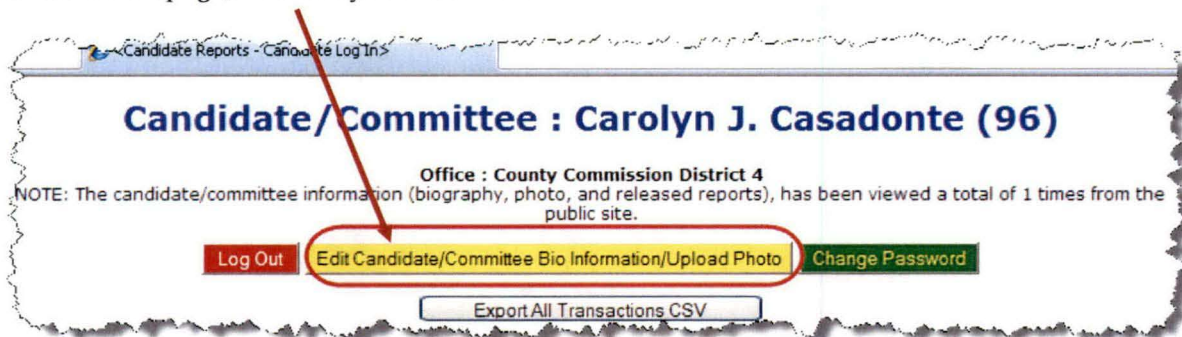
The item in the photo area need not be a photograph. Committees might prefer to show their logo instead. But the file placed in this area must be a JPEG file. That is, the three-character file extension must be **jpg**.

The system will not accept a JPEG file that is larger than **500 KB**. It's best to use an even smaller file if you can, because smaller files display more quickly to website visitors than large ones, especially if a visitor has a slow Internet connection.

Note: Images with large dimensions (that is, large pixel sizes) might not display properly in certain older browsers.

To enter a photo:

On the main page, click the yellow button.



to bring up the Candidate/Committee Bio page:

Candidate/Committee Bio

Candidate Photo

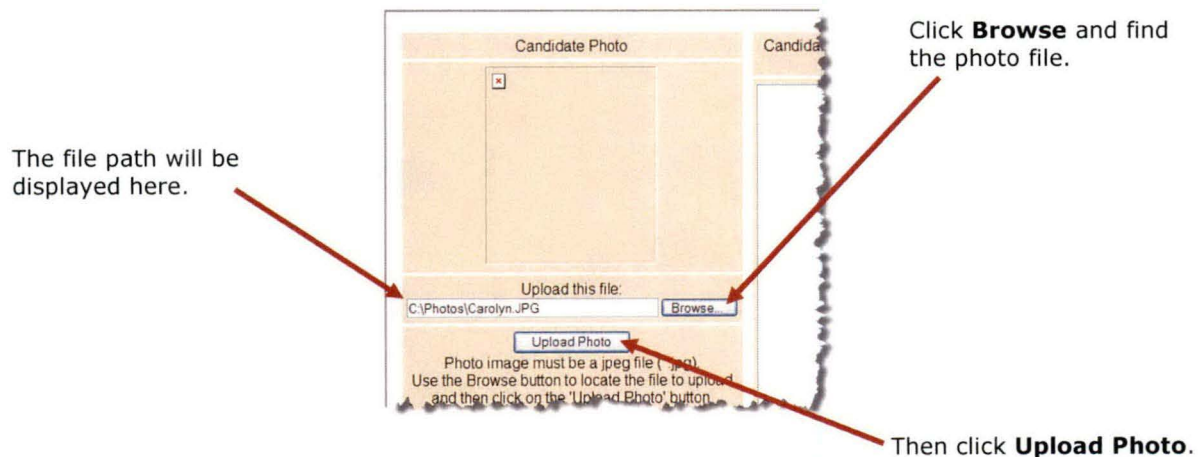
Upload this file:

Photo image must be a jpeg file (*.jpg).
Use the Browse button to locate the file to upload
and then click on the 'Upload Photo' button.
To ensure your pictures load in a timely fashion for internet
users that have slower connections,
we recommend that you use an image file that does not exceed
100kb. Image pictures are limited to a maximum of 500kb.

Candidate/Committee Biographical Information

Characters (Max 5,000)

Click **Browse** and navigate to the JPEG file you want to use. Then click **Upload Photo**.



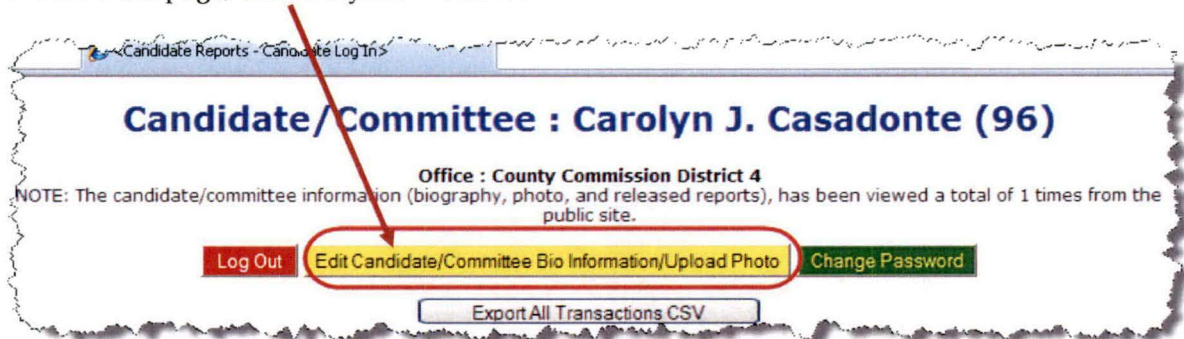
When the file has copied to the system, you'll see this message along with the photo file:



Click [Return to Main Menu](#) to return to the main page of the system.

To enter candidate or committee text:

On the main page, click the yellow button.



to bring up the Candidate/Committee Bio page:

A screenshot of the "Candidate/Committee Bio" page. The page is divided into two main sections. The left section is titled "Candidate Photo" and contains a large empty box for the photo. Below this box is a text input field labeled "Upload this file:" with a "Browse..." button next to it. Below the input field is an "Upload Photo" button. Below the button, there is a paragraph of instructions: "Photo image must be a jpeg file (*.jpg). Use the Browse button to locate the file to upload and then click on the 'Upload Photo' button. To ensure your pictures load in a timely fashion for internet users that have slower connections, we recommend that you use an image file that does not exceed 100kb. Image pictures are limited to a maximum of 500kb." The right section is titled "Candidate/Committee Biographical Information" and contains a large text area for the biography. At the bottom of this section is a "Characters" counter showing "0" and "(Max 5,000)", and an "Update" button. At the very bottom of the page is a "Cancel / Return to Menu" button.

In the **Candidate/Committee Biographical Information** pane, type the information you want to display to voters. You can enter up to 5,000 characters. The system will show you – in the **Characters** box – how many characters you have typed so far. When you are finished, click **Update**.

Type the biographical data here.

When finished, click **Update**.

Candidate/Committee Biographical Information

Carolyn Casadonte's work with neighborhood associations for the past 20 years uniquely qualifies her for the service as a County Commissioner.

She understands the concerns of individual residents in our community and will ensure those concerns are properly prioritized by the County.

Or particular interest to Carolyn is preservation of our outstanding--and irreplaceable--natural environment. While serving as president of the Woodgate Neighborhood Association and chair of the Council of Neighborhood Associations, she worked tirelessly--and effectively--to prevent

Characters 629 (Max 5,000)

Update

The system will show you how many characters you've already typed, so you'll know when you're reaching the limit.

Be sure you conform to the Elections Office policy on appropriate content here.

If you ever want to change the photo or bio, just return to the Candidate/Committee Bio page and upload a different photo or edit the bio text.

To see how your photo and bio appear to voters, enter this address in your web browser:

https://www.voterfocus.com/ws/WScand/candidate_pb.php?county=lee

The Lee County Supervisor of Elections reserves the right to review your information before it is released to the public on its website. Use of this feature is a privilege; a medium for personal recognition in connection with your campaign, or in the case of a committee, a narrative of the committee's scope and mission. Feature guidelines are simple, and the following restrictions apply; the feature SHALL NOT BE USED for:

- Political campaign advertising (your biography or mission statement IS NOT a "paid political advertisement");
- Malicious, insensitive, or derogatory statements about opposing candidates, political parties, committees or organizations, their spouses, children, immediate or extended families or employees;
- Offensive photographs;
- Personal or commercial business advertising.

What if I forgot my password?

The Supervisor of Elections office does not have access to your password or PIN#.

If you've forgotten your password, you can simply reset it by clicking the **Forgot Password** link on the Log In page.

Numeric Candidate ID (no leading zeros) Password

[Forgot Password?](#)

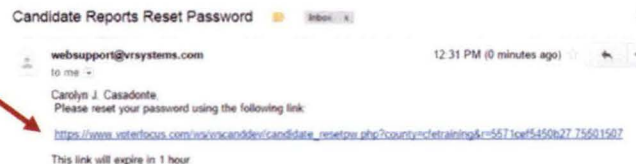
On the Candidate Forgot Password page, enter your Candidate ID number and click the **Reset Password** button.

Candidate Forgot Password

Numeric Candidate ID (no leading zeros)

An email similar to the one below will be sent to the email address associated with your account.

Click the link provided in the email.



If for some reason there is not an email address associated with your Candidate ID, you'll need to contact the Supervisor of Elections office.

On the Candidate Reset Password page:

Candidate Reset Password

Enter a new password in the **New Password**.

Enter the same password in the **Re-enter Password** field to confirm the new password.

New Password

Re-enter Password

The password must be a minimum of 8 (letters and/or numbers only) and is case-sensitive.

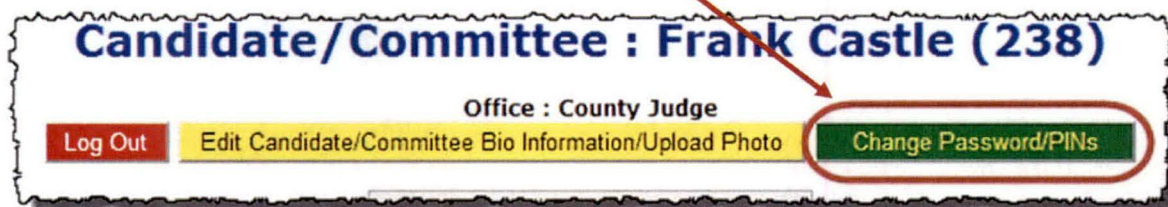
Click the **Reset Password** button and proceed to the Log In page.

How do I change my password or PINs?

Your campaign will be issued a password and PINs (Personal Identification Numbers) for the candidate and treasurer. You do not have to change the PINs issued by the elections office, but you may, if you wish.

To change your Password or PINs:

On the Report List, click **Change Password/PINs**.



- In the **Enter Old Finance System Access Password** field, enter your current password. You need to do this even if you don't want to change the password, in order to change one or both PINs.
- If you want to change a PIN, enter and reenter the new PIN in the two fields provided for the new PIN.
- If you don't want to change your password, don't make any changes to the password fields.
- If you want to create a new password, enter and reenter it in the two fields provided for the new password. The password must be a minimum of 8 characters (letters and/or numbers only) and is case-sensitive. Enter your new password in the both new password fields.
- Click **Change Password/PINs** when you are finished either changing the PINs or the password.

Change Password/PINs

Only alter the password/pins you wish to change at this time.

Enter Old Finance System Access Password (REQUIRED)
(The one you used to log in to this session)

Enter New Finance System Access Password

ReEnter New Finance System Access Password

Enter New Candidate/Committee electronic PIN

ReEnter New Candidate/Committee electronic PIN

Enter New Treasurer electronic PIN

ReEnter New Treasurer electronic PIN

Change Password/PINs Cancel

Type your current password here.

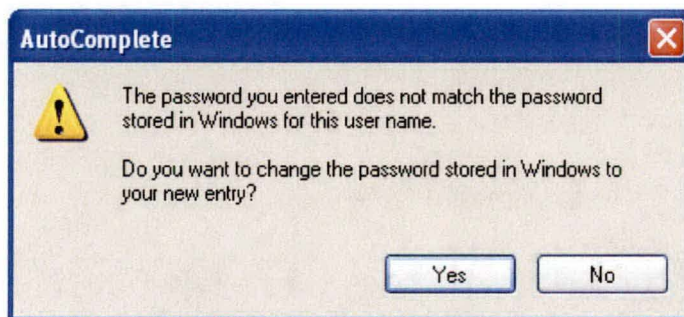
Type your new password here.

Type your new candidate PIN here...

...and your new treasurer PIN here.

To finish changing the password or PINs, click here.

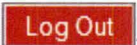
From now on, you will log on with your new password. Keep in mind: if you set up the Candidate Log In page to automatically fill in your password, you will need to retype the password there the next time you log in. When you do, you might see this message:

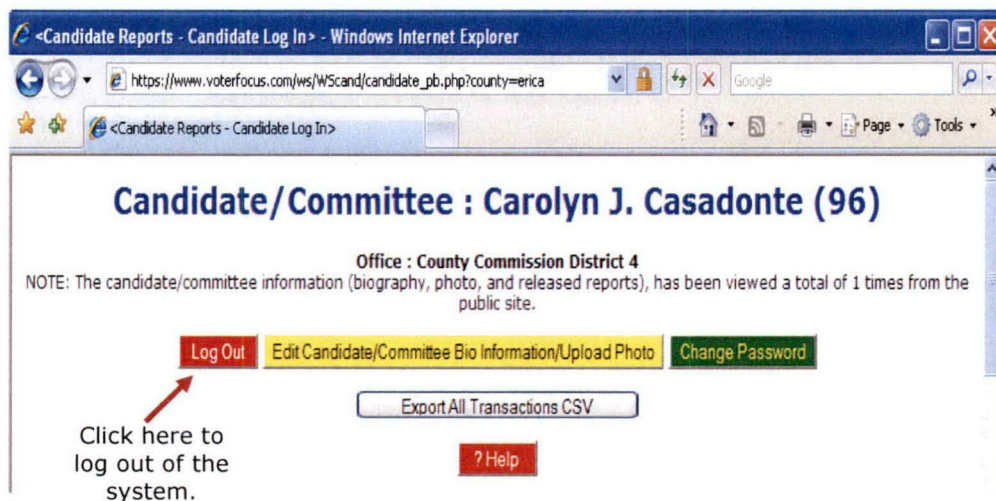



Simply click **Yes** to proceed into the Campaign Financial Reporting system. Should you forget your new password or PINs, contact the elections office; they will not be able to retrieve it for you, however, they will be able to reset you back to the original assigned password and PIN created by the office which you will be required to change.

Don't forget to log out of the system.

When you are finished with a session on the Campaign Financial Reporting system, be sure to log out so that unauthorized persons cannot modify your report data.

On the Report List, click .



Be sure you **LOG OUT** and not just close out your browser or use the back arrow  to exit. Neither of these options will log you out of the system.

NOTES:

NOTES:

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How to File Financial Reports Online: A Handbook for Candidates & Committees

Last update to this document: February 12, 2020 VR Systems / Edited for Lee County/C. Futch, T. Lipa

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End

Questions?

Contact the Qualifying Department for Assistance

Cheryl Futch, Qualifying Officer

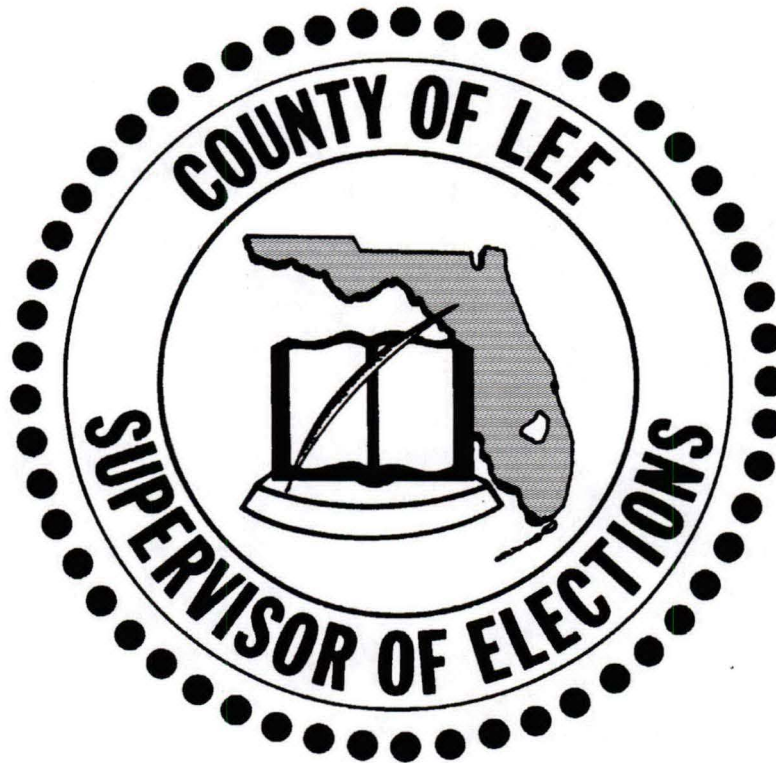
239-533-6311

cfutch@lee.vote

Tammy Lipa, Administration Support Specialist

239-533-6329

tlipa@lee.vote



www.lee.vote

(239) LEE-VOTE (533-8683)

RECEIVED

2021 FEB 15 P 4: 06

STATE OF FLORIDA
ELECTIONS COMMISSION

Express

The Way

Fec

FRI - 12 FEB AA
STANDARD OVERNIGHT

FedEx
TRACKING
0200

8095 2276 1741

XH TLHA

32399

FL-US
TLH



FID: 3957492 11Feb2021 FWYA 56062/2598/1823

RT 865
FZ
16:30
1741
02-12

FedEx
Express

Package
US Airbill

FedEx Tracking Number 8095 2276 1741

Form ID No. 0200

Rec

1 From

Date 2/12/2021

Sender's Name Phoenix, Petch Phone 323 922-4311

Company LLC Co Supervisor of Elections

Address 2440 Thompson St.

City Tampa State FL ZIP 33601

2 Your Internal Billing Reference

3 To

Recipient's Name Florida Election Phone 850 922-4339

Company Commission

Address 2700 W. Central Ave. 12th Floor

Address 12th Floor 1314

City Tampa State FL ZIP 32399-1050

4 Express Package Service

Next Business Day

☐ FedEx First Overnight
Earliest next business morning delivery to select locations. Friday shipments will be delivered on Monday unless Saturday Delivery is selected.

☐ FedEx Priority Overnight
Next business morning. Friday shipments will be delivered on Monday unless Saturday Delivery is selected.

☒ FedEx Standard Overnight
Saturday Delivery NOT available.

2 or 3 Business Days

☐ FedEx 2Day A.M.
Second business morning. Saturday Delivery NOT available.

☐ FedEx 2Day
Second business afternoon. Saturday Delivery NOT available.

☐ FedEx Express Saver
Third business day. Saturday Delivery NOT available.

5 Packaging

☐ FedEx Envelope* ☐ FedEx Pak* ☐ FedEx Box

6 Special Handling and Delivery Signature Options

☐ Saturday Delivery
NOT available for FedEx Standard Overnight, FedEx 2Day A.M., or FedEx Express Saver.

☐ No Signature Required
Package may be left without obtaining a signature for delivery.

☐ Direct Signature
Someone at recipient's address may sign for delivery.

☐ Signature Required
Signature required for delivery.

Does this shipment contain dangerous goods?
One box must be checked.

☐ No ☐ Yes
As per attached Shipper's Declaration.

☐ Yes
Shipper's Declaration not required.

☐ Dry Ice
Dry Ice, 9 UN 1845

☐ Carg

Restrictions apply for dangerous goods — see the current FedEx Service Guide.

7 Payment Bill to:
Sender
Acct. No. in Section 1 will be billed.
☐ Recipient
☐ Third Party
☐ Credit Card

Total Packages Total Weight
Box.
Credit Card Auth.



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